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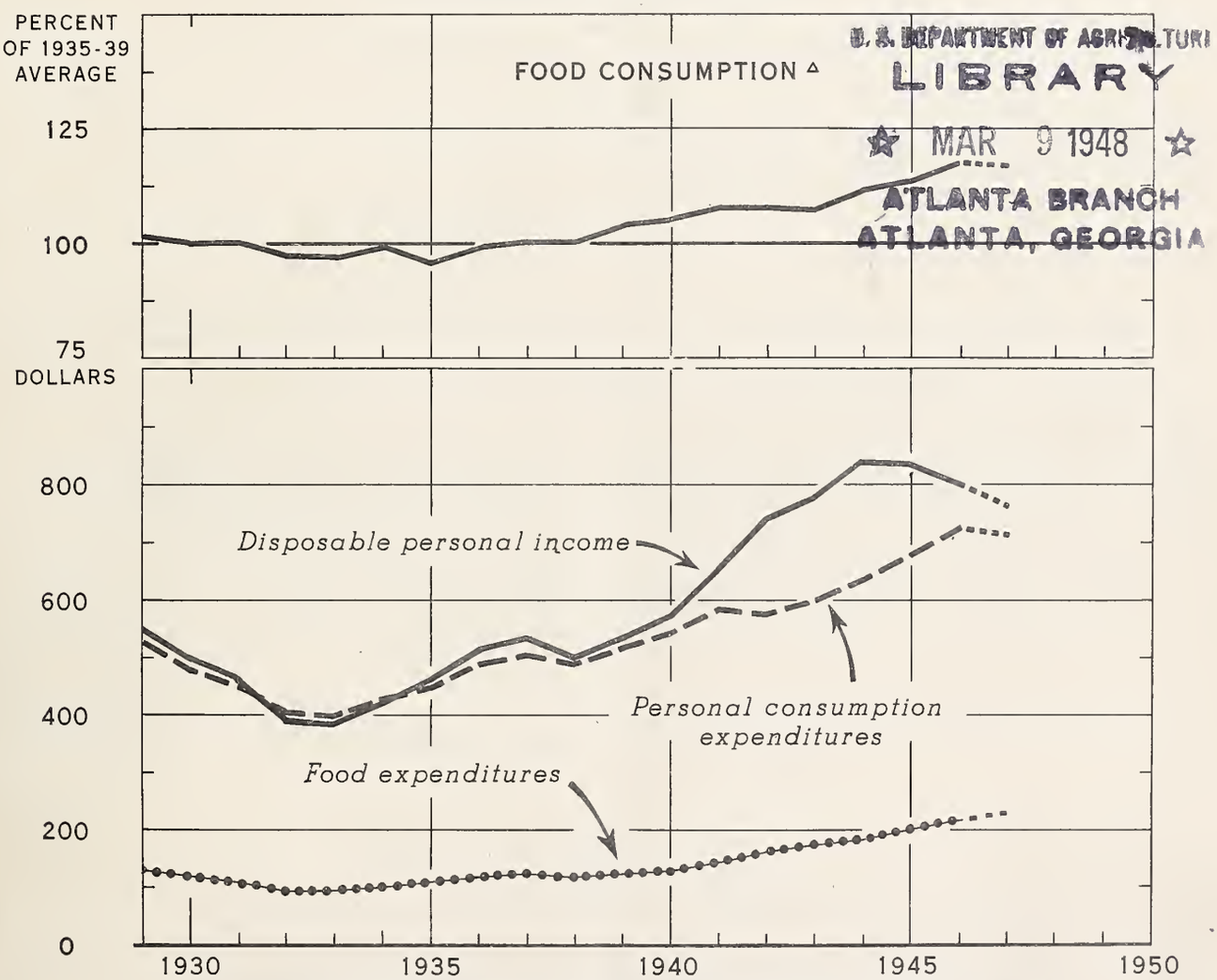
# THE National Food SITUATION

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

NFS - 43 BAE JANUARY - MARCH 1948

## REAL DISPOSABLE PERSONAL INCOME, PERSONAL CONSUMPTION EXPENDITURES, FOOD EXPENDITURES, AND CONSUMPTION PER PERSON, 1929-47*

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*INCOME AND EXPENDITURE DATA FROM BUREAU OF FOREIGN AND DOMESTIC COMMERCE EXCEPT 1947 FOOD EXPENDITURES, WHICH WERE ESTIMATED BY BAE*

**ESTIMATES FOR 1947 ARE PRELIMINARY. INCOME AND EXPENDITURE SERIES DEFLATED BY BLS CONSUMER PRICE INDEX*

*△INDEX BASIS — WEIGHTED BY 1935-39 RETAIL PRICES, BAE DATA, CIVILIAN ONLY, 1941-47*

U. S. DEPARTMENT OF AGRICULTURE NEG. 46666 BUREAU OF AGRICULTURAL ECONOMICS

Since 1945 consumers have been spending a larger part of their disposable income on food than in previous years. Food consumption per person has increased about 3 percent in the past 2 years, and in 1947 was 17 percent above the 1935-39 average. The proportion of consumer income saved has declined since the end of the war and narrowed the gap between disposable personal income (personal income less direct personal taxes) and personal consumption expenditures.

# THE NATIONAL FOOD SITUATION

Approved by the Outlook and Situation Board, February 24, 1948

## SUMMARY

United States civilians probably will eat moderately less food in 1948 than the near-record amount of 1947 but more than in any year before 1945. If growing weather is favorable, production of food crops may equal the 1947 record. But food from livestock is expected to be less plentiful, chiefly because of the decline in livestock numbers.

Domestic consumers probably will have more sugar, rice, dried fruits, and dried whole milk than in 1947. Supplies of other food products will be as large or only moderately smaller than last year. Meat consumption is expected to be from 143 to 146 pounds per person, the fifth highest in the last 25 years, but from five to seven percent less than last year. Per capita consumption of most food items is likely to exceed the 1935-39 average and will be as much or more than the quantities consumed during the war years. The exceptions are fresh apples, lamb and mutton, butter, shortening, potatoes, sweetpotatoes and some cereal products.

Total food production in the United States in 1947 was the highest on record since 1909. The food crop output was a new high and the quantity of food from livestock was surpassed only in 1944 and 1945. This made possible the second highest rate of per capita food consumption of record.

Consumption per person of beef, cheese, evaporated milk and margarine, was a record in 1947. Consumers also ate more veal, butter, lard, fresh apples and citrus fruits, sugar, and rice than in 1946. On the other hand, the consumption of lamb and mutton, pork, poultry, fluid milk and cream, ice cream, shortening, dried fruits and fresh vegetables was less than in 1946. Compared with the 1935-39 average, in 1947 people ate less lamb and mutton, butter, shortening, fresh apples, dried fruits, potatoes and sweetpotatoes, and some of the cereal products.

The index of retail food prices in selected cities in the United States reached a record in 1947. The retail price of all major food groups averaged above 1946.

Among the foods that are expected to be relatively plentiful in most of the United States during March 1948 are fresh citrus fruits, apples and winter pears; fresh cabbage, carrots and celery; canned citrus juices, grapefruit segments, peas (lower grades), pumpkin, sweetpotatoes and tomato juice; most dried fruits; frozen peas; walnuts, filberts and pecans; honey; peanut butter; fresh and frozen fish; eggs; and stewing chickens.

Table 1.-Volume of agricultural production for sale and for farm home consumption and civilian per capita food consumption, 1943-46 and preliminary estimates for 1947, with percentage comparisons

(Index numbers, 1935-39 = 100)

| Item | 1943 | 1944 | 1945 | 1946 | 1947 Prel. 1/ | 1947 as a percentage of 1946 |
|---|---|---|---|---|---|---|
| Food grains 2/ | 116 | 148 | 155 | 164 | 196 | 120 |
| Truck crops 3/ | 124 | 137 | 142 | 157 | 138 | 88 |
| Fruits and nuts 4/ | 108 | 123 | 112 | 135 | 130 | 96 |
| Vegetables, excluding truck crops 5/ | 125 | 106 | 110 | 128 | 104 | 81 |
| Sugar crops 6/ | 81 | 81 | 94 | 103 | 108 | 105 |
| Total food crops 7/ | 116 | 129 | 130 | 145 | 147 | 101 |
| Meat animals 8/ | 150 | 155 | 147 | 145 | 146 | 101 |
| Poultry 9/ | 152 | 153 | 163 | 153 | 152 | 99 |
| Dairy products 10/ | 113 | 115 | 119 | 119 | 120 | 101 |
| Total food livestock | 138 | 141 | 141 | 138 | 138 | 100 |
| Food production | 133 | 138 | 138 | 139 | 141 | 101 |
| Agricultural production, food and non-food | 128 | 136 | 133 | 136 | 135 | 99 |
| Civilian per capita food consumption | 107 | 112 | 114 | 118 | 116 | 98 |

1/ Production estimates are based on the December crop report and estimated marketings and home consumption of livestock and livestock products.
2/ Includes wheat, rye, rice, and buckwheat.
3/ Includes truck crops for market (artichokes, asparagus, lima beans, snap beans, beets, cabbage, cantaloups, carrots, cauliflower, celery, cucumbers, eggplant, lettuce, onions, peas, peppers, spinach, tomatoes, and watermelons) and truck crops for processing (asparagus, lima beans, snap beans, beets, cabbage, sweet corn, cucumbers, peas, spinach, and tomatoes).
4/ Includes apples, peaches, pears, cherries, apricots, grapes, strawberries, cranberries, oranges, grapefruit, lemons, olives, dried California figs, fresh and dried plums, almonds, pecans, and walnuts.
5/ Includes dry edible beans, potatoes, sweetpotatoes.
6/ Includes sugar beets, sugarcane for sugar, sugarcane sirup, sorgo sirup, maple sugar, and maple sirup.
7/ Includes peanuts in addition to the other crops.
8/ Includes cattle and calves, sheep and lambs, and hogs.
9/ Includes eggs, chickens, turkeys, and broilers.
10/ Includes wholesale milk, retail milk, butterfat, farm butter, and farm consumption of dairy products.

Table 2 - Total food disappearance: Source and distribution, 1935-39 average and 1940 to 1947 1/

| Year | Source of total food: Total food disappearance | Source of total food: Food production | Source of total food: Imports | Source of total food: Reduction in stocks | Source of total food: Increase in stocks | Distribution by claimants: Civilian | Distribution by claimants: Military including civilian feeding | Distribution by claimants: Department of Agriculture 2/: Net purchases | Distribution by claimants: Department of Agriculture 2/: Deliveries | Distribution by claimants: Department of Agriculture 2/: Reduction in stocks | Distribution by claimants: Department of Agriculture 2/: Increase in stocks | Commercial exports and shipments 3/ |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Percentage of food disappearance in each year | | | | | | | | | | | |
| 1935-39 | 100.0 | 93.7 | 6.4 | | .1 | 97.4 | | | | | | 2.6 |
| 1940 | 100.0 | 94.9 | 5.5 | | .4 | 97.8 | | | | | | 2.2 |
| 1941 | 100.0 | 94.7 | 5.8 | | .5 | 93.7 | 1.9 | 2.8 | 2.6 | | .2 | 1.6 |
| 1942 | 100.0 | 94.0 | 3.8 | 2.2 | | 86.6 | 6.2 | 6.2 | 5.3 | | .9 | 1.0 |
| 1943 | 100.0 | 95.7 | 4.8 | | .5 | 79.7 | 10.5 | 8.6 | 7.3 | | 1.4 | 1.2 |
| 1944 | 100.0 | 94.1 | 4.9 | 1.0 | | 78.2 | 13.0 | 6.6 | 7.1 | .5 | | 2.2 |
| 1945 | 100.0 | 94.3 | 4.9 | .8 | | 81.7 | 12.4 | 4/ 3.9 | 4.9 | 1.0 | | 2.0 |
| 1946 | 100.0 | 96.2 | 4.1 | | .3 | 89.7 | 3.4 | 4/ 4.4 | 5.2 | .8 | | 2.5 |
| 1947 Prel. | 100.0 | 96.2 | 4.8 | | 1.0 | 90.0 | 3.1 | 4/ 2.7 | 2.6 | | .1 | 4.2 |
| | Percentage of 1935-39 food disappearance | | | | | | | | | | | |
| 1935-39 | 100.0 | 93.7 | 6.4 | | .1 | 97.4 | | | | | | 2.6 |
| 1940 | 109.7 | 104.1 | 6.0 | | .4 | 107.2 | | | | | | 2.5 |
| 1941 | 113.8 | 107.8 | 6.6 | | .6 | 106.6 | 2.2 | 3.1 | 2.9 | | .2 | 1.9 |
| 1942 | 124.6 | 117.2 | 4.7 | 2.7 | | 107.9 | 7.7 | 7.7 | 6.6 | | 1.1 | 1.3 |
| 1943 | 130.3 | 124.7 | 6.3 | | .7 | 103.8 | 13.7 | 11.3 | 9.5 | | 1.8 | 1.5 |
| 1944 | 137.5 | 129.3 | 6.8 | 1.4 | | 107.6 | 17.8 | 9.1 | 9.7 | .6 | | 3.0 |
| 1945 | 137.1 | 129.3 | 6.8 | 1.0 | | 112.1 | 17.0 | 4/ 5.3 | 6.6 | 1.3 | | 2.7 |
| 1946 | 136.4 | 131.3 | 5.5 | | .4 | 122.3 | 4.6 | 4/ 6.1 | 7.1 | 1.0 | | 3.4 |
| 1947 Prel. | 137.4 | 132.1 | 6.6 | | 1.3 | 123.7 | 4.2 | 4/ 3.7 | 3.6 | | .1 | 5.8 |

1/ The upper section of the table divides the total disappearance in each year (1) according to the source of the food, and (2) according to its distribution. Both the total disappearance figure and the breakdown are on an index number basis; that is, they represent quantities weighted by average farm prices in the period 1935-39. The disappearance figure includes both domestically produced and imported foods. The lower portion of the table contains the same data expressed as a percentage of total food disappearance in 1935-39 instead of total disappearance in each year. 2/ The quantities assigned to the Department of Agriculture are principally food for lend-lease and relief. These quantities are measured in two ways: (1) in terms of Department of Agriculture purchases from commercial channels, and (2) in terms of shipments out of the country. When measured in terms of purchases, additions to Department of Agriculture stocks included. When measured in terms of shipments, additions to stocks are shown separately. Department of Agriculture shipments were smaller than the total quantities purchased from 1941 to 1943 and stocks were built up. In 1944 to 1946, however, shipments exceeded purchases and stocks were decreased. 3/ The 1935-39, 1940-41 exports and shipments are strictly commercial. For the war years, they approximate the commercial portion as indicated by total exports and shipments less the exports assignable to the Department of Agriculture. 4/ Including transfers for relief from military stocks in U. S.

Table 3.- Apparent civilian consumption of major food commodities on a per capita basis, calendar years, 1935-39 average, 1944, 1945, 1946, 1947 and forecasts for 1948 with percentage comparisons 1/

| Commodity | Average 1935-39 | 1944 | 1945 | 1946 | 1947 Prel. | Forecasts for 1948 | 1948 as a percentage of 1935-39 | 1948 as a percentage of 1947 |
|---|---|---|---|---|---|---|---|---|
| | Pounds | Pounds | Pounds | Pounds | Pounds | Pounds | | |
| Meats (dressed weight) - Total | 125.6 | 152.8 | 143.8 | 152.8 | 154 | 143-146 | 115 | 94 |
| Beef | 54.8 | 53.6 | 58.9 | 60.5 | 69 | 62-64 | 115 | 91 |
| Veal | 8.0 | 12.4 | 11.8 | 9.9 | 11 | 10 | 125 | 91 |
| Lamb and mutton | 6.7 | 6.6 | 7.2 | 6.7 | 5 | 5 | 75 | 100 |
| Pork (excluding lard) | 56.1 | 80.2 | 65.9 | 75.7 | 69 | 66-67 | 119 | 96 |
| Poultry products | | | | | | | | |
| Eggs 2/ | 37.3 | 43.8 | 49.6 | 46.8 | 47.5 | 47.5 | 127 | 100 |
| Chicken (dressed weight) | 17.9 | 26.8 | 28.9 | 25.3 | 23.3 | 22.8 | 127 | 98 |
| Turkey (dressed weight) | 2.6 | 3.3 | 4.3 | 4.5 | 4.1 | 3.4 | 131 | 83 |
| Dairy products | | | | | | | | |
| Total milk (whole milk equivalent) | 801 | 780 | 794 | 810 | 793 | 776 | 97 | 98 |
| Cheese | 5.5 | 4.9 | 5.9 | 6.9 | 7.1 | 6.8 | 124 | 96 |
| Condensed and evaporated milk | 16.7 | 16.1 | 18.3 | 18.8 | 19.6 | 19.8 | 119 | 101 |
| Fluid milk and cream | 340 | 412 | 433 | 425 | 398 | 386 | 114 | 97 |
| Fats and oils - Total, fat content 3/ | 44.7 | 41.2 | 39.5 | 39.6 | 41.1 | 41.1 | 92 | 100 |
| Butter, farm and factory (actual weight) | 16.7 | 12.0 | 10.8 | 10.3 | 11.2 | 11.0 | 66 | 98 |
| Lard | 11.0 | 12.6 | 11.5 | 11.8 | 12.7 | 12.7 | 115 | 100 |
| Margarine | 2.3 | 3.1 | 3.3 | 3.1 | 4.1) | | | |
| Shortening | 11.7 | 9.2 | 10.0 | 10.1 | 9.4) | 19.5 | 96 | 100 |
| Other edible fats & oils | 6.3 | 6.6 | 6.0 | 6.3 | 6.0) | | | |
| Fruits | | | | | | | | |
| Fresh - total | 138.5 | 143.8 | 143.8 | 140.7 | 146.0 | 143 | 103 | 98 |
| Citrus | 48.8 | 67.8 | 65.4 | 58.3 | 62.0 | 59 | 121 | 95 |
| Apples (Commercial) | 30.2 | 25.4 | 22.9 | 23.1 | 25.0) | 84 | 94 | 100 |
| Other (excluding melons) | 59.5 | 50.6 | 55.5 | 59.3 | 59.0) | | | |
| Processed | | | | | | | | |
| Canned fruit | 14.9 | 9.3 | 14.7 | 21.2 | 19.5 | 4/ | - | - |
| Canned juices | 4.0 | 9.9 | 10.3 | 17.1 | 15.1 | 4/ | - | - |
| Frozen | .8 | 2.0 | 2.3 | 3.1 | 3.4 | 4/ | - | - |
| Dried | 5.7 | 6.4 | 6.1 | 5.0 | 6.0 | 4/ | - | - |
| Vegetables | | | | | | | | |
| Fresh | 235 | 254 | 265 | 271 | 250 | 257 | 109 | 103 |
| Canned | 31.1 | 34.6 | 43.2 | 46.5 | 42.4 | 4/ | - | - |
| Frozen | 5/ .4 | 1.4 | 1.7 | 2.1 | 2.6 | 4/ | - | - |
| Potatoes | 131 | 127 | 129 | 126 | 124 | 4/ | - | - |
| Sweetpotatoes | 23.5 | 19.4 | 19.7 | 17.9 | 17.0 | 4/ | - | - |
| Dry edible beans | 8.8 | 7.8 | 7.7 | 8.7 | 8.4 | 4/ | - | - |
| Canned soups & baby foods | 5.2 | 8.8 | 10.2 | 11.6 | 10.0 | 4/ | - | - |
| Sugar (refined) | 96.5 | 89.1 | 73.6 | 74.7 | 96.5 | 100 | 104 | 104 |
| Grains | | | | | | | | |
| Corn products: | | | | | | | | |
| Corn meal | 22.9 | 20.0 | 19.0 | 17.0 | 18 | 17 | 74 | 94 |
| Corn sirup | 7.7 | 12.1 | 12.0 | 12.0 | 12.9 | 11.0 | 143 | 85 |
| Corn starch | 1.3 | 1.4 | 1.9 | 1.9 | 1.9 | 1.7 | 131 | 89 |
| Corn sugar | 2.7 | 4.0 | 3.8 | 3.8 | 4.5 | 3.8 | 141 | 84 |
| Breakfast cereals | 1.7 | 2.5 | 2.5 | 2.2 | 2.6 | 2.4 | 141 | 92 |
| Hominy | 1.2 | 1.8 | 1.7 | 1.5 | 1.8 | 1.7 | 142 | 94 |
| Oatmeal | 3.9 | 3.2 | 4.1 | 4.4 | 4.4 | 4.3 | 110 | 98 |
| Barley food products 6/ | 1.2 | 1.5 | 1.5 | 1.8 | 1.7 | 1.7 | 142 | 100 |
| Wheat: | | | | | | | | |
| Flour 7/ | 153.1 | 162.2 | 160.7 | 153.4 | 144.2 | 146 | 95 | 101 |
| Breakfast cereals | 3.7 | 3.7 | 3.7 | 3.5 | 3.6 | 3.6 | 97 | 100 |
| Rye flour | 2.2 | 2.6 | 2.6 | 1.9 | 1.7 | 1.7 | 77 | 100 |
| Rice, milled | 5.6 | 4.9 | 4.7 | 4.1 | 4.9 | 5.2 | 93 | 106 |
| Beverages | | | | | | | | |
| Coffee 8/ | 14.0 | 15.8 | 16.7 | 19.3 | 18 | 4/ | - | - |
| Tea | .67 | .53 | .59 | .53 | .5 | 4/ | - | - |
| Cocoa beans | 4.4 | 3.6 | 4.0 | 4.1 | 4 | 4/ | - | - |
| Peanuts (shelled) | 4.4 | 6.3 | 6.3 | 5.2 | 5.0 | 4/ | - | - |

Population estimates used to obtain per capita consumption figures are official Census estimates of total population adjusted for underenumeration of children under 5 and for military personnel not eating out of civilian supplies.

1/ Data on calendar year basis except for dried fruits which are on a pack year basis; fresh citrus fruits and peanuts on a crop year basis, rice on August 1 year. All years begin in year indicated except for fresh citrus, which begins in October of the previous year and rice which begins in August of previous year. 2/ In terms of number of eggs, the apparent per capita consumption was 298 in 1935-39, 350 in 1944, 397 in 1945, 374 in 1946, and 380 estimated for 1947 and 1948. 3/ Computed from unrounded data. 4/ Not available until April-June issue. 5/ Average 1937-39. Data prior to 1937 are not available. 6/ All barley food produots in terms of malt equivalent. 7/ Includes white, whole wheat, and Semolina flour. 8/ Green bean basis.

## NUTRITIONAL REVIEW 1/

The 1947 per capita supplies of most nutrients were slightly smaller than in 1946, but still considerably above the average for 1935-39. The major decreases in 1947, as compared to 1946, were in ascorbic acid, vitamin A value and thiamine. A 6 percent decrease in thiamine resulted chiefly because of the decline in pork and grain products consumption. The decline in calcium and riboflavin was due to a reduction in fluid milk and cream, and in leafy, green and yellow vegetables. Smaller supplies of these vegetables also contributed to an 8 percent decrease in ascorbic acid and a 7 percent reduction in vitamin A value. Despite the reduction of over-all food consumption in 1947, the available supply of food energy was about the same as in 1946 primarily because of the increased supplies of sugar and eggs.

Except for carbohydrate, the 1947 per capita supplies of all major nutrients were well above the averages for 1935-39. The enrichment of bread and the greater consumption of meat and fluid milk and cream were the prime factors in the 30 to 40 percent increase in the supplies of iron, thiamine, riboflavin and niacin. Increased consumption of fruit and some vegetables resulted in an increase in ascorbic acid and vitamin A. Larger supplies of calcium in 1947 resulted from greater consumption of fluid milk and cream. The increase in overall food consumption more than offset the smaller use of potatoes and grain products, so that the supply of food energy per person was about 5 percent higher than in prewar years.

On the basis of food supply forecasts, per capita supplies of major nutrients in 1948 probably will be slightly smaller than those available for consumption in 1947, but still much above the 1935-39 average. Supplies of ascorbic acid probably will be slightly higher than in 1947, and food energy and vitamin A value may be about the same. A small decrease in calcium and riboflavin is indicated because of the prospective further decline in the per capita consumption of fluid milk and cream. Slightly larger sugar supplies will cause some increase in carbohydrates. The expected reduction in meat consumption will reduce somewhat the available supplies of protein, iron, thiamine and miacin.

## RETAIL FOOD PRICES

In 1947, retail food prices in 56 principal cities of the United States averaged higher than in any other year. According to the Bureau of Labor Statistics index, the price of food purchased by moderate income families averaged 194 percent of the 1935-39 level, 21 percent above the 1946 average, and 33 percent above June 1946. The two largest increases in the index were from February to March, and from August to September, the other month-to-month changes were more moderate but the trend was upward.

The retail price index of every major food group in 1947 averaged higher than in 1946 (see Table 8). The greatest increases over the 1946 average were: meat, poultry and fish, 35 percent; dried fruits and vegetables, more than 38 percent; beverages, 34 percent; and fats and oils, about 30 percent.

Among the factors contributing to record retail food prices were the unusually large income flow to individuals and heavy consumer expenditures. The strong foreign demand also helped push prices upward.

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1/ Prepared in cooperation with the Bureau of Human Nutrition and Home Economics.

Retail food prices rose to a record index of 210 in January 1948. A survey on the current price situation was made recently, and it was estimated that retail prices on February 17 were from 3 to 4 percent below those on January 13. The survey covered the prices of 20 foods in 12 cities, carefully selected to represent the average price movement of all foods in large cities throughout the country.

According to the Bureau of Labor Statistics, there has not yet been enough time for a clear trend of retail prices as a whole to emerge. The decline from January to February was partly in anticipation of lower wholesale costs, and partly because of seasonal trends.

Table 4. - Nutrients available for civilian consumption per capita per day, calendar years, 1935-39 average, 1943 to 1947 and forecasts for 1948 with percentage comparisons. 1/

| Nutrients | Unit | Average 1935-39 | 1943 | 1944 | 1945 | 1946 | 1947 Prel. | 1948 Forecast | 1948 as a percentage of 1935-39 | 1948 as a percentage of 1947 |
|---|---|---|---|---|---|---|---|---|---|---|
| Food energy | Cal. | 3,250 | 3,400 | 3,470 | 3,370 | 3,400 | 3,420 | 3,370 | 104 | 99 |
| Protein | Grams | 89 | 99 | 100 | 103 | 102 | 98 | 94 | 106 | 96 |
| Fat | Grams | 132 | 142 | 145 | 138 | 144 | 142 | 139 | 105 | 98 |
| Carbohydrate | Grams | 428 | 430 | 440 | 428 | 420 | 432 | 436 | 102 | 101 |
| Calcium | Grams | .90 | 1.02 | 1.04 | 1.08 | 1.13 | 1.07 | 1.04 | 116 | 97 |
| Iron | Mg. | 13.8 | 16.7 | 18.5 | 19.0 | 18.9 | 18.4 | 17.9 | 130 | 97 |
| Vitamin A | I.U. | 8,100 | 9,200 | 9,400 | 9,800 | 9,700 | 9,000 | 8,900 | 110 | 99 |
| Thiamine | Mg. | 1.54 | 2.19 | 2.28 | 2.24 | 2.29 | 2.16 | 2.11 | 137 | 98 |
| Riboflavin | Mg. | 1.86 | 2.20 | 2.48 | 2.55 | 2.58 | 2.45 | 2.39 | 128 | 98 |
| Niacin | Mg. | 15.4 | 19.1 | 21.6 | 21.9 | 21.5 | 20.6 | 20.1 | 131 | 98 |
| Ascorbic acid | Mg. | 115 | 126 | 132 | 139 | 140 | 129 | 131 | 114 | 102 |

1/ Data computed by the Bureau of Human Nutrition and Home Economics on the basis of estimates of apparent civilian consumption (retail basis) including estimates of consumption from urban gardens, supplied by the Bureau of Agricultural Economics. No deductions have been made in the nutrient estimates for the loss of waste in the home or for the destruction or loss of nutrients during the preparation of food. Deductions have been made for inedible refuse. The data for iron, thiamine, riboflavin, and niacin include the amounts of these nutrients added to white bread and flour under the enrichment program. The 1947 and 1948 estimates assume that voluntary enrichment will continue at the rate required under WFO-1.

## MEAT

### Review of 1947

Meat consumption in 1947 was about 154 pounds per person, the largest on record since 1909. More beef was consumed per person than in any of the last 37 years. However, people ate less veal and pork than in some of the war years. Lamb and mutton consumption per capita was the lowest since 1927. Meat supplies varied less by seasons than in 1946 when production fluctuated widely from May to October as price controls lapsed and then were reimposed.

Production in 1947 was about 23.3 billion pounds, the fourth highest on record. Continued heavy slaughter reduced the number of cattle and calves in 1947 (see Table 5, below). However, sheep slaughter was the lowest in 18 years. Marketings of 1947 spring pigs were earlier than usual and about 2 million fewer hogs were on farms on January 1, 1948 than a year earlier. Stocks of pork in commercial cold storage facilities increased more than usual in late 1947 and on January 1, 1948 were 520 million pounds, almost twice as large as a year earlier.

Imports in 1947 amounted to 65 million pounds (dressed meat basis). However, exports of beef, veal, lamb, mutton and pork amounted to 256 million pounds, one percent of the total United States meat supply but about one-fifth of 1946 exports. In addition, large quantities of horse meat were exported for foreign relief and also civilian feeding programs in occupied areas. Military procurement of meat (beef, veal, lamb, pork) in 1947 was almost 30 percent below the 1946 total of 945 million pounds (dressed meat basis).

### Prospects for 1948

Meat supplies for the year as a whole are expected to provide civilians with 143 to 146 pounds per person compared with 154 pounds (wholesale dressed meat basis) in 1947. However, meat consumption per capita in 1948 will be about 15 percent greater than the 1935-39 average and will be the fifth highest in the last 25 years. Lamb and mutton consumption per capita probably will be the lowest since 1917. If consumer incomes remain high, meat prices in 1948 could increase somewhat from present levels as meat supplies decline. Normally, a 10 percent decline in annual meat supplies will result in about the same rise in average annual retail prices if demand remains unchanged. Seasonal changes in the meat supply are expected to follow about the usual pattern in the first half of 1948. But the decline from the second to the third quarter probably will be sharper than usual. In July - September, when supplies usually are the lowest of the year, per capita meat supplies may be more than 5 percent below the quantity consumed in the third quarter of 1947. In the last quarter of 1948, per capita meat supplies may decline even more compared with the same period in 1947.

Meat output in 1948 may be about 2 billion pounds below 1947 but will still be relatively large. The reduction will result primarily from the smaller number of livestock on farms and ranches. Reduced grain feeding of cattle and sheep also will contribute to a decline in meat production in 1948. Livestock numbers have declined each year since January 1, 1944 (see Table 5, below).

Sheep and lamb slaughter has been declining since 1944, and may be smaller in 1948 than last year. No material increase in lamb and mutton output is in prospect for the next few years. Pork production may be moderately below last year's output, chiefly because of the unusually heavy marketings of the 1947 spring crop before January 1, 1948 and the smaller slaughter in prospect for the last quarter of 1948 indicated by an anticipated decrease in the 1948 spring pig crop.

Meat stocks in commercial cold storage plants on January 1, 1948 were 730 million pounds, almost two-thirds again as large as on the same date in 1947 and around 18 percent greater than the 1935-39 average. The larger 1948 stocks will partly offset the reduced output.

Imports of canned beef are likely to be larger than in 1947 and to some extent will offset meat exports and shipments to United States territories. Less meat probably will be shipped out of the country in 1948 than last year. The current meat allocations to commercial export claimants are about 5 million pounds per month. Shipments to territories may be about as large as in 1947. The proposed European Recovery Program does not call for exports of meat other than horse meat for the first two years of the program.

Table 5. - Number of livestock on farms and ranches, United States, January 1, average 1935-39 and annual 1940-48.

| Year | Milk cows | Other cattle | Hogs | Sheep and lambs | All chickens | Chickens, layers | Turkeys |
|---|---|---|---|---|---|---|---|
| | Thous. | Thous. | Thous. | Thous. | Thous. | Thous. | Thous. |
| 1935-39 Av. | 24,999 | 41,815 | 43,932 | 51,241 | 405,108 | 364,537 | 6,035 |
| 1940 | 24,940 | 43,369 | 61,165 | 52,107 | 438,288 | 392,655 | 8,569 |
| 1941 | 25,543 | 46,302 | 54,353 | 53,920 | 422,341 | 381,315 | 7,193 |
| 1942 | 26,313 | 49,712 | 60,607 | 56,213 | 476,955 | 427,911 | 7,485 |
| 1943 | 27,138 | 54,066 | 73,281 | 55,150 | 542,047 | 488,950 | 8,600 |
| 1944 | 27,704 | 57,630 | 83,741 | 50,782 | 582,197 | 523,587 | 7,429 |
| 1945 | 27,770 | 57,803 | 59,331 | 46,520 | 516,497 | 473,880 | 7,203 |
| 1946 | 26,695 | 55,739 | 61,301 | 42,436 | 530,203 | 474,233 | 8,493 |
| 1947 | 26,093 | 55,109 | 56,921 | 37,813 | 474,441 | 435,665 | 6,650 |
| 1948 1/ | 25,195 | 55,399 | 55,038 | 35,332 | 462,976 | 427,863 | 4,507 |

1/ Preliminary

# FISH

## Review of 1947

Fish consumption in 1947 was somewhat above 1946. Consumer demand for fresh and frozen fish during the first half of 1947 was less than expected by producers but the market improved considerably after July. Consumption of canned fish, with prices much above the 1946 levels, was higher than in the preceding year. Even at unusually high prices, a pound of canned salmon was relatively less expensive than an equivalent amount of most cuts of meat.

The total catch of fish for food use was below that of 1946. Fish landings in the important New England ports through August 1947 were about 50 million pounds below the total for the same months of 1946. In the latter part of the year, however, stronger demand for fresh and frozen fish stimulated the expansion of commercial fishing. By the end of the year, the difference between the 1947 and 1946 outputs was less than at mid-year. Commercial fish freezing operations had a very poor start in 1947. For the year, production was about 25 percent below 1946. Because of decreased military takings and exports, domestic canned fish supplies were greater than in 1946. The 1947 canned tuna and mackerel packs were considerably larger than in 1946; salmon production was only moderately above the low 1946 output; the packs of both pilchards and sardines were smaller.

Stocks of fresh and frozen fish were reduced from the record of 153 million pounds on January 1, 1947 to 134 million pounds by the end of the year. Most of the January 1, 1947 carry over had been moved into consumption channels by May. The movement was facilitated by a sharp reduction in prices of the major species and by a decrease in production. The movement of packers' supplies of the major species of canned fish into domestic consumption channels also was rapid.

Fish imports in 1947 were below those of 1946. Preliminary estimates place receipts of fresh and frozen groundfish fillets (cod, haddock, hake, pollock, cusk and rosefish) at about one-third below 1946. Canned fish imports were also below those of 1946.

Exports of fish in 1947 were somewhat smaller than in previous years. The shortage in dollar exchange available to foreign nations contributed to the decline.

## Prospects for 1948

United States civilian consumption of fish is expected to exceed last year's rate through most of 1948. Fish supplies in 1948 are likely to be larger than in 1947. Strong demand and the likelihood of more favorable prices will tend to encourage more extensive commercial fishing.

Production of fresh and frozen fish probably will be considerably above 1947. However, no significant change from last year's output is now anticipated for canned fish, except possibly pilchards.

Imports of fish may increase in view of prospects for high prices in the United States, reduced tariffs on canned fish and fishery products, and the strong foreign demand for dollar exchange. Fish exports, on the other hand, are not expected to exceed last year.

## POULTRY AND EGGS

### Review of 1947

The number of eggs consumed per person in 1947 was about 380, slightly higher than in the previous year and more than one fourth above the prewar average. In the last quarter, more eggs were eaten by consumers in the United States than in the same period of any other year, except possibly 1946.

Total supplies of eggs in 1947 were only moderately above the previous year. Production was about as large as in 1946, but commercial stocks on January 1, 1947 were 109 million dozen, about 80 percent above those a year earlier and the largest since 1938. Purchases of eggs by military agencies, by the Department of Agriculture for price support purposes, and for export, were about a quarter below 1946.

Civilians consumed 23.3 pounds of chicken per capita, substantially more than the 1935-39 average, but almost a tenth less than in 1946 and the least since 1941. Total supplies of chicken were 7 percent smaller than in 1946. Production was slightly below that of 1946, and the January 1, 1947 stocks were substantially below those of a year earlier. Purchases by the military, and for export and shipment were very small.

The consumption of turkeys in 1947 was around 4 pounds per person, moderately less than in the two preceding years but larger than in any year prior to 1945. Turkey supplies in 1947 were almost 15 percent below 1946, with most of the drop resulting from a decline in production. Stocks at the beginning of 1947 were almost a fifth higher than a year earlier. "Off-season" consumption of turkeys reached a record in 1947.

Prices of both chicken and eggs rose in 1947. According to the Bureau of Labor Statistics, the average retail price of eggs was 20 percent higher in 1947 than in 1946 while the average price of roasting chickens in selected large cities was up 5 percent. The average for both eggs and chickens was the highest ever reported. The previous record for eggs was established in 1920, for chicken in 1946.

### Prospects for 1948

Eggs will be plentiful in 1948 and domestic consumption is expected to be a near record. Production will be moderately less than in 1947 but purchases for price support and export may be much smaller. Retail prices of eggs during most of 1948 are expected to average higher than in 1947.

Chicken supplies during the first half of the year are expected to be greater than in the same period of 1947. Because of heavier culling resulting from high feed prices, slaughter of farm chickens may be somewhat larger than a year ago. Commercial broiler production probably will be about the same. In addition, cold storage stocks of chicken on January 1 totaled 226 million pounds, about a fourth larger than at the beginning of 1947 and higher than in any other year except 1946. With higher feed prices, fewer chicks will be raised for flock replacement. As a result, chicken supplies in the last half of 1948 will be moderately below those of the same months of 1947. Retail prices of chicken during the first half of 1948 are not likely to change much from present levels.

Turkey consumption in 1948 will be below that of the previous year. "Off-season" turkey consumption will be much below 1947 primarily because stocks on January 1, 1948 were only 83 million pounds, more than a third below that of a year earlier. If farmers carry out their intentions to raise 18 percent fewer turkeys than in 1947, the quantity available for consumption during the 1948 holiday season will be the lowest for a decade.

## DAIRY PRODUCTS

### Review of 1947

Per capita consumption of dairy products was approximately 793 pounds (milk equivalent, fat solids basis), slightly below 1946 and the 1935-39 average. According to the Bureau of Labor Statistics, the average retail price for dairy products in selected urban areas for 1947 was about 13 percent above the average for 1946 and was the highest on record.

From 1942 to 1946 consumer income had been high relative to food prices compared with prewar years, and the per capita consumption of most dairy products other than butter reached new highs. The gradual decline of consumer real income in 1947 and the relatively high price for dairy products contributed to the reduction in the per capita consumption of fluid milk and cream, and ice cream. Ice cream consumption per person declined about 18 percent from the record of 1946 but was still more than twice the 1935-39 average. Fluid milk consumption was moderately below the records of 1945 and 1946 but about 17 percent above the prewar average. Most of the decline probably was due to the fact that higher prices restricted consumption by lower income families. Consumption of cheese, evaporated milk and condensed milk was greater than in the previous year and also exceeded the 1935-39 average. Consumption of both dried whole milk and dried skim milk dropped somewhat from the 1946 level but was still more than 1½ times the prewar average. Butter consumption per person was 11.2 pounds, almost 10 percent above 1946 but more than 30 percent below the 1935-39 average.

Total milk production in 1947 was the third highest on record even though the number of dairy cows on farms declined for the third consecutive year. The rate of milk production per cow was well maintained through most of the year despite the fact that feed supplies were short and the price of feed per unit of milk produced was less favorable to dairy farmers in 1947 than in the past few years.

Exports of dairy products in 1947 were 3.6 percent of total supplies and 32 percent less than in the previous year when substantial shipments were made from Army stocks. Imports of cheese were less than half those of 1946.

### Prospects for 1948

Principally because of a continued decline in cow numbers total milk production will be lower than in 1947. Per capita supplies of milk and dairy products available for consumption in 1948 will be slightly less than the 793 pounds (milk equivalent, fat solids basis) consumed in 1947 but below the 1935-39 average by less than 5 percent. On a non-fat solids basis, however, civilian consumption of dairy products may be about one fourth above the prewar average, principally because of the greater use of fluid milk and skim milk products. During the first half of the year, prices of most dairy products probably will average higher than a year earlier.

Per capita consumption of individual dairy products, except butter, is expected to continue substantially higher than in 1935-39. However, the per capita consumption rates will not differ as much from the prewar average as did consumption during the war years. Fluid milk and cream consumption may be slightly smaller than in 1947 because of higher average prices. Cheese and evaporated milk consumption probably will be close to the previous year's level. Dried milk consumption will continue above prewar. Civilians may eat less ice cream than last year but about twice as much as in 1935-39.

Dairy products have been requested under the proposed European Recovery Program. Quantities of cheese, condensed milk and evaporated milk requested under this program are considerably below the war time peaks. However, the requested exports of dried milk -- especially dried skim milk -- are nearer the record of the war years than other items because of their nutritional importance, relatively low cost and high keeping qualities.

## FATS AND OILS

### Review of 1947

Disappearance of food fats into civilian trade channels in 1947 totaled about 41 pounds (fat content) per person, slightly more than a year earlier. More butter, margarine, and lard went to civilians than in 1946, but less shortening and edible oil. Most of the increase in disappearance resulted from larger production of butter, lard, cottonseed oil, and soybean oil.

Exports of food fats from the United States were smaller in 1947 than a year earlier. Total exports and shipments of lard, margarine, shortening, edible oils and butter were about 600 million pounds, approximately 15 percent below the previous year. On the other hand, domestic supplies of food fats were increased by the use of about 130 million pounds of coconut oil in food products compared with 36 million pounds in 1946 and by imports of 24 million pounds of edible oils, almost twice those of 1946.

Factory and warehouse stocks of food fats and oils were slightly larger at the end of 1947 than at the beginning. This is in contrast to 1946 when more than 300 million pounds of food fats were withdrawn from inventories.

The production of butter increased from 1,501 million pounds in 1946 to 1,637 million pounds in 1947. Disappearance into civilian trade channels rose from 10.3 to 11.2 pounds (actual weight) per person. The increase was due largely to a decline in the consumption of fluid milk and cream, since the total farm output of milk decreased in 1947. Creamery butter output in the last 3 months of 1947, however, was 14 percent less than a year earlier.

Despite an increase over 1946, butter output in 1947 was still about 600 million pounds below the 1937-41 average, a reduction of more than 25 percent. With consumer incomes high, butter brought record prices. Retail prices in leading cities of the United States in 1947 averaged 80.5 cents per pound. In September and December, the retail price exceeded 90 cents per pound.

High prices for butter (see Table 6, below) encouraged increased output and consumption of margarine. Production of margarine in 1947 rose to nearly 750 million pounds (actual weight), a new record.

Table 6. - Retail price per pound of butter and margarine, leading cities, United States, averages 1932-41 and annual 1947.

| Year | Butter | Margarine | Price of butter as a percentage of price of margarine | Difference between price of butter and price of margarine |
|---|---|---|---|---|
| | Cents | Cents | Percent | Cents |
| Average: | | | | |
| 1932-36 | 33 | 16 | 206 | 17 |
| 1937-41 | 37 | 17 | 213 | 20 |
| 1947 | 81 | 41 | 198 | 40 |

Compiled from reports of the Bureau of Labor Statistics.

Exports of margarine were small in 1947, but civilian disappearance in the United States totaled about 4.1 pounds (fat content basis) per person, one pound more than in 1946 and almost twice the 1935-39 average. Total disappearance of butter and margarine (fat content basis) in 1947 was about 13 pounds per person compared with the prewar average of about 18 pounds per person.

Production of lard increased from 2,138 million pounds in 1946 to about 2,430 million pounds in 1947. More hogs were slaughtered than in 1946, and the yield of lard per hog was unusually large in the first 9 months of the year, reflecting heavy feeding of corn from the bumper 1946 crop. Principally because of increased output, disappearance of lard into civilian trade channels rose from 11.8 pounds per person in 1946 to 12.7 pounds in 1947.

The increase in lard consumption was nearly offset by a decrease in consumption of shortening. Civilian disappearance of shortening was 9.4 pounds per person, compared with 10.1 pounds in 1946. Disappearance of other edible oils into civilian trade channels for direct use by household consumers, bakers, confectioners and manufacturers of mayonnaise, salad dressing and other food products, amounted to 6 pounds per person, slightly under the 1946 rate.

Total production of the vegetable oils used mainly in the manufacture of margarine, shortening, and other food products in 1947 was about 3,040 million pounds (crude basis), about 300 million pounds over 1946. The principal increase was in cottonseed-oil output. The 1947 cottonseed crop was more than 30 percent larger than a year earlier, and a larger-than-usual percentage was crushed by the end of 1947. Soybean oil production, largely as a result of the large 1946 crop, also was greater in 1947.

Total use of vegetable oils in food products was about the same in 1947 as last year. In 1946, over 300 million pounds were withdrawn from factory and warehouse stocks. In 1947, however, stocks decreased only slightly. Exports were somewhat larger in 1947 than a year earlier. Use of coconut oil in food products increased materially in 1947, but this was about offset by increased use of soybean oil in nonfood products.

Prospects for 1948

The domestic disappearance of food fats in 1948 may be about the same as last year. Total supplies are likely to be smaller than in 1947, but the decline may be offset by smaller exports and by withdrawals from inventories.

Lard production will be smaller than in 1947 because of a decline in hog production and the marketing of the animals at lighter weights during at least the first nine months of the year. No increase over 1947 in domestic supplies of the other types of edible fats and oils is likely unless the 1948 oil crops are larger than last year's. Total imports of edible oils, including olive oil and coconut oil used in food products, probably will be higher than in 1947 but still below the 1935-39 average.

## FRUIT

Review of 1947

Civilian per capita consumption of fruit in 1947 probably exceeded slightly the 1946 record of 231 pounds, fresh plus processed on a fresh fruit equivalent basis. Fresh fruit accounted for about 63 percent of the total quantity of fruit consumed, nearly the same as in 1946. Although the 1947 fruit crop was slightly smaller than the 1946 output, consumption was maintained by increased imports, especially bananas, and by drawing upon stocks of canned fruits, canned fruit juices and frozen fruits. Prices for most fruits were lower than in 1946.

Fresh fruit consumption in 1947 was about 146 pounds per capita, 5 pounds over 1946 and 7 pounds over the 1935-39 average. More citrus fruit, apples and bananas, but less of other fruits, were consumed fresh in 1947 than in 1946.

Total fruit production was about 18 million tons (fresh basis), slightly less than in 1946. The 1947 deciduous fruit crop amounted to slightly more than 10 million tons, five percent below the previous year's output but 10 percent above the 1935-39 average. Only the production of strawberries and pears was larger than in 1946. The 1946-47 citrus crop, most of which was marketed in 1947, was a record of 7.9 million tons. The 1947-48 crop, which was started to market in the fall of 1947, is expected to total 7.7 million tons. Imports of bananas in 1947, exceeded those of 1946 and equaled the 1935-39 level.

Supplies of canned fruits and fruit juices were large in 1947. Stocks at the beginning of the year were much larger than on January 1, 1946. The 1946-47 production of canned fruits and juices, most of which was available for consumption in 1947, was a record. Receipts of canned pineapple and pineapple juice from Hawaii were slightly higher than in 1946. These supplies enabled the United States civilians in 1947 to consume approximately 20 pounds of canned fruit per person, about one pound under the 1946 record, and only slightly less of canned fruit juices than the 16.5 pound record of 1946.

Consumption of frozen fruit, fruit juices and berries reached a new high of 3.4 pounds per person despite a sizable decline in production compared with 1946. Production was about a fourth below the 1946 record of 523 million pounds. Stocks of frozen fruit on January 1, 1947 totaled 471 million pounds, the largest in history, but were reduced 100 million pounds by the end of the year. The reduction in stocks and production brought a better balance among the supplies of the important frozen fruit items.

Supplies of dried fruits in 1947 were relatively scarce until the new pack became available in the summer. The 1947-48 pack, estimated at about 600,000 tons, is about a fifth larger than the 1946-47 pack but a tenth smaller than the record of 1943-44. All of the increase in the 1947-48 production is in raisins, which make up about half of the pack. Dried prune output, which is 35 percent of the total dried fruit, is down about 8 percent. With moderately larger supplies and some reduction in price, civilian per capita consumption of dried fruit in 1947-48 is expected to exceed the 5 pound rate in 1946-47 and probably will reach 6 pounds.

Since last September the Department of Agriculture has purchased more than 200,000 tons of surplus dried fruit out of the 1947-48 pack. Of this, 24,000 tons are being distributed to the School Lunch Program and charitable institutions, and the remainder is available for relief feeding abroad.

Retail prices of most fruits in 1947 were lower than in 1946. The price decline, however, was much sharper at the farm level than at retail. Factors which contributed to the price drop were: large output, a decline in the volume of exports, and larger stocks of canned and frozen fruits and fruit juices on January 1, 1947.

Prospects for 1948

Available supplies of fruit probably will continue to support large per capita fruit consumption until the 1948 crop is harvested. Market supplies of fresh citrus fruits from the 1947-48 crop continue plentiful. Cold storage stocks of fresh fruit on January 1, 1948, were very large. Apples in storage on that date were about 9 percent more than stocks a year earlier and 17 percent greater than the 1943-47 average. Stocks of fresh pears exceeded January 1, 1947 stocks by 20 percent and the 1943-47 average by 58 percent. January 1 stocks of frozen fruits were substantially below the record of the same date in 1947 but stocks of the other processed fruits were large.

With average or better weather, another large fruit crop can be expected in 1948.

Imports of bananas, which in 1947 reached prewar levels, probably will be still larger in 1948. Exports of dried fruits may exceed last year's total.

## VEGETABLES

Review of 1947

Consumption of fresh vegetables in 1947 was about 250 pounds per person, the lowest since 1943, although still 5 percent above the 1935-39 average. Production was almost 10 percent below the 1946 output, but the decline was partly offset by increased imports and by the large stocks of cabbage and onions at the beginning of the year.

Supplies of canned vegetables in 1947 were smaller than in 1946, and civilian consumption declined moderately from the 1946 record of 46.6 pounds. Stocks on January 1, 1947 were the largest on record. The 1947 pack of canned vegetables, although substantially above the average for 1935-39, was about a fifth less than the 1946 pack. Retail price reductions on some canned vegetable items for which stocks were very large contributed to a slight decline in total stocks by the end of the year. Purchases for export and for military use

were slightly more than 6 percent of the quantity which entered into consumption channels in 1947.

Large supplies of frozen vegetables were available as a result of unusually large stocks on January 1, 1947, and production was second only to the record pack of 1946. Civilian consumption of frozen vegetables was 2.5 pounds per capita, the highest thus far. Cold storage stocks at the end of 1947 were 41.3 million pounds smaller than at the beginning of the year.

Potato consumption per person in the United States was slightly lower in 1947 than the 196 pounds used in 1946. Production in 1947 was 378 million bushels, about 20 percent below the 1946 crop. However, stocks on January 1, 1947 were much larger than a year earlier. The effect of the smaller 1947 output on the amount available for consumption during that year was almost counterbalanced by larger withdrawals from stocks and by smaller Government purchases of potatoes than in 1946. The Department of Agriculture purchases of 1947 crop potatoes to date total about 25 million bushels, compared with 98 million bushels bought from the 1946 crop of 476 million bushels.

Sweetpotato supplies were slightly smaller than in 1946. Production in 1947 was almost 15 percent below the previous year's crop, but civilian consumption per person was only slightly below 1946, partly because of the decline in non-food uses.

Production of dry edible beans in 1947 was slightly greater than both the 1946 crop and the 1936-45 average, but stocks at the beginning of 1947 were low compared with the years prior to 1946. Civilian consumption was only moderately below the 1946 rate of 8.7 pounds per person. Military purchases amounted to about 6 percent of the 1947 crop. Commercial exports and shipments of dry edible beans were nearly three times the 3[illegible] million pound average for 1935-39.

Prospects for 1948

Per capita consumption of fresh vegetables during the first quarter of the year, except for cabbage and onions, is slightly larger than during the same period of 1947. January 1 stocks of cabbage and onions were very low. However, the quantity of fresh vegetables produced for the winter season market is about 6 percent above the 1947 crop and about 20 percent above the 1937-46 average. For the year as a whole, the per capita consumption of vegetables probably will be maintained at the 1947 rate of 250 pounds or higher.

Stocks of canned and frozen vegetables for consumption during the first half of 1948 are smaller than during the same period of last year. The canned vegetable carryover was slightly lower than a year earlier. Frozen vegetable stocks were 41.3 million pounds less than the January 1, 1947 stocks, a reduction of 12 percent. Military purchases, and exports and shipments of processed vegetables in 1948 as usual probably will not take more than 5 percent of total supplies.

Potato and sweetpotato consumption per person is expected to be maintained near the 1947 level. Primarily because stocks on January 1, 1948 were lower than a year earlier, supplies available for consumption during the first half of 1948 may be somewhat lower than in the same months of last year.

Production of dry edible beans and peas in 1948 may be smaller than last year. Difficulties associated with soil conservation, crop rotation, and maintenance of soil fertility, coupled with competition from alternative crops, will make it difficult to get as large an acreage and production of dry edible beans as in 1947. The goal for dry peas calls for a planted acreage about 8 percent smaller than that planted in 1947.

## GRAINS

### Review of 1947

Consumption of wheat, rye and rice as food in the United States was below average in 1947, even though the wheat and rice crops were the largest ever produced in this country. Record wheat exports were necessary largely because of the failure of the grain and other staple food crops in Western European countries. The amount of wheat and rye fed to livestock was below that of 1946.

The total domestic use of wheat in 1947 was 715 million bushels. Civilian consumption was 207 pounds (grain equivalent) per capita (totaling 493 million bushels), slightly below the 1946 rate and approximately 6 percent lower than the 1935-39 average. The use of wheat for livestock feed amounted to 147 million bushels, larger than the prewar average but substantially less than in some of the more recent years. About one-half million bushels of wheat were used for the production of alcohol and distilled spirits. Wheat exports and shipments to territories amounted to 492 million bushels.

Domestic consumption of rye as food was 2.2 pounds per capita (grain equivalent), 8 percent smaller than in 1946 and almost 38 percent under the 1935-39 average. While supplies in 1947 were small, they were substantially above 1946. Stocks at the end of the year were 14.4 million bushels, compared with 8.5 million bushels at the beginning. The quantity fed to livestock was 3.9 million bushels, the smallest on record. Only 2.0 million bushels were exported.

Domestic rice supplies increased during the year but were again below the prewar level because of the heavy demand for export and shipment to territories. Civilian food use from the record 1946 crop is estimated at 4.9 pounds of milled rice per capita, about 20 percent above the 4.1 pounds consumed in 1946 but about 13 percent under the 1935-39 average of 5.6 pounds. The total civilian food use of rice (milled equivalent) in 1947 was about 700 million pounds, compared with 548 million pounds a year earlier. Exports and shipments are estimated at 1,149 million pounds; quantities for feed and seed, and brewers use of broken rice, 272 million pounds; and military procurement, 73 million pounds.

Per capita food consumption of corn, oats and barley is estimated at 82 pounds (grain equivalent), 5 percent above the 1946 rate and almost 20 percent above the 1935-39 average. The production of corn harvested as grain in 1947 was 2,153 million bushels, 27 percent below the record crop of 1946 and about 15 percent below the 1937-46 average. The output of oats and barley were slightly below the 10-year average. Exports of corn to deficit food areas in the first half of 1947 were large because of the record 1946 crop. Prices of feed grains advanced sharply during the year.

Prospects for 1948

Domestic supplies of food grains are expected to be relatively plentiful in 1948. January 1 stocks of wheat were 795 million bushels, nearly one-fourth larger than a year earlier and one-sixth larger than on January 1, 1946. Rye stocks, although still small, were larger than a year earlier. Even though prospects for the early season bread-grain crop in important importing countries such as France and Italy are much more favorable than a year ago, requirements are so great that exports of food grains in 1948 will again be very heavy. Especially large exports of wheat and flour will be made in order to offset greatly reduced exports of corn, a result of the short corn crop harvested in the fall of 1947.

Per capita consumption of wheat in 1948 is not expected to be much different than in 1947. Another large wheat crop is expected, although somewhat smaller than the record of 1,365 million bushels in 1947. A winter wheat crop of about 839 million bushels was forecast as of December 1, 1947 based upon conditions to that date. If the spring wheat yield is average and the acreage is about the same as in 1947, the crop may reach 275 million bushels. Thus, the 1948 total wheat crop may exceed 1 billion bushels. There have been only five United States wheat crops of a billion bushels or more, four of them in the past four years.

Per capita consumption of rye as food in 1948 is expected to continue below the prewar average. The acreage of rye sown last fall for harvest in 1948 is estimated at 3,726,000 acres, slightly above the 3,709,000 acres in 1946 and little more than half of the 1936-45 average of 5,945,000 acres. The rye crop condition on December 1, 1947 was reported at 86 percent, 6 percent below a year earlier. The acreage to be harvested as grain will not be large enough to supply all feed and alcohol requirements in addition to food and seed needs.

Civilian supplies of rice from the record 1947 crop are expected to be the equivalent of about 750 million pounds of milled rice or about 5.2 pounds per capita. This will be the largest civilian supply since 1943, but still below prewar. The 1947 rice crop is estimated at 2,405 million pounds (milled basis). Feed, seed and the use of broken rice by brewers may total 350 million pounds. If exports and shipments from this output total approximately 1,150 million pounds and military purchases about 70 million, which now seem possible, only small supplies of rice will remain at the end of the marketing year. Another large acreage in 1948 is expected.

Per capita consumption of food products processed from corn is likely to be somewhat smaller than in 1947, while consumption of oats and barley products probably will be about the same. Stocks of these grains at the beginning of the year were 25 percent below January 1, 1947 and about 14 percent below the 1938-42 average. Much smaller marketings of corn during 1947-48 than a year earlier will reduce the quantity of corn available for processing into food at least until the 1948 crop is harvested. Exports of corn during the first nine months of this year will be negligible. In the same period of 1947 they amounted to 124 million bushels. Exports of the other grains during the first six months of 1948 are expected to be smaller than in the same period of 1947 when oats and oatmeal exports totaled 12 million bushels (grain equivalent) and barley (including malt) about 18 million bushels (grain equivalent).

# SUGAR

## Review of 1947

United States civilians consumed about 96.5 pounds of sugar (refined basis) per capita in 1947, over 25 percent more than in 1946 and almost as much as the average for 1935-39. Domestic production of beet and cane sugar in 1946, most of which was consumed in 1947, was only slightly more than the 1936-45 average. Total receipts of sugar from off-shore production areas were the largest since before the war.

Early in 1947, it was apparent that more sugar would be available to the United States than had been expected. Thus, in April, the quantity of sugar obtainable with each ration coupon was increased. A few months later ration controls were terminated -- on June 12 for household and institutional consumers, and on July 28 for industrial users of sugar. Inventory controls remained in force until August 30, and price controls until October 31.

Under the terms of the Cuban Purchase Agreement of July 1946, the price paid for Cuban sugar was tied to the United States consumer price index to protect Cuba against price increases for the commodities which she purchased in the United States. During the latter part of 1946, the retail price of granulated sugar increased about 25 percent. From January to December 1947, the price went up only about 4 percent. The average monthly retail price in 1947 was the highest since 1923.

## Prospects for 1948

Under the Sugar Act of 1948, the amount of sugar needed to meet the requirements of consumers in the continental United States during 1948 has been set at 7.8 million short tons, raw basis. This will provide United States civilians with about 100 pounds per capita (refined basis), slightly more than both in 1947 and the 1935-39 average.

Continental United States production of beet and cane sugar in the 1947 crop year, most of which will be consumed in 1948, was approximately 2.2 million tons, raw basis, about 13 percent above both the 1946 crop and the 1936-45 average. The world production of sugar in the 1947-48 crop year is estimated at about 10 percent above the 1946 crop, and sugar is in plentiful supply in the United States at prevailing prices. In order to maintain the orderly marketing of sugar and in accordance with the terms of the Sugar Act of 1948, the Department of Agriculture has reestablished marketing quotas for continental growers of sugar and import limitations on off-shore areas which supply the continental United States.

Table 7.-Production of major food commodities, calendar years, 1935-39 average, 1945, 1946, 1947 and forecasts for 1948 with percentage comparisons 1/

| Commodity | Unit | Average 1935-39 | 1945 | 1946 | 1947 Prel. | Forecasts for 1948 | 1948 as a percentage of 1935-39 | 1948 as a percentage of 1947 |
|---|---|---|---|---|---|---|---|---|
| Meats (dr. wt.) | | | | | | | | |
| Beef | Mil. lb. | 6,936 | 10,279 | 9,378 | 10,400 | 9,300 | 134 | 89 |
| Veal | " " | 1,038 | 1,661 | 1,440 | 1,600 | 1,500 | 145 | 94 |
| Lamb and mutton | " " | 871 | 1,054 | 970 | 800 | 700 | 80 | 88 |
| Pork (excluding lard) | " " | 7,337 | 10,697 | 11,173 | 10,500 | 9,600 | 131 | 91 |
| Total meats | " " | 16,182 | 23,691 | 22,961 | 23,300 | 21,100 | 130 | 91 |
| Poultry and eggs | | | | | | | | |
| Eggs | Mil. doz. | 3,335 | 5,120 | 5,098 | 5,085 | 4,900 | 147 | 96 |
| Chicken (dr. wt.) | Mil. lb. | 2,327 | 4,170 | 3,568 | 3,445 | 3,300 | 142 | 96 |
| Turkey (dr. wt.) | " " | 350 | 673 | 687 | 545 | 480 | 137 | 88 |
| Dairy products | | | | | | | | |
| Total milk 2/ | " " | 103,656 | 120,995 | 119,285 | 118,892 | 117,500 | 113 | 99 |
| Cheese 3/ | " " | 669 | 1,117 | 1,099 | 1,207 | 1,150 | 172 | 95 |
| Cond. and evap. milk | " " | 2,225 | 4,124 | 3,335 | 3,508 | 3,400 | 153 | 97 |
| Fluid milk and cream 4/ | " " | 44,146 | 57,671 | 59,910 | 56,926 | 56,300 | 128 | 99 |
| Fats and oils | | | | | | | | |
| Butter, farm & factory (actual weight) | " " | 2,170 | 1,701 | 1,501 | 1,637 | 1,640 | 76 | 100 |
| Lard 5/ | " " | 1,624 | 2,010 | 2,114 | 2,330 | 2,100 | 129 | 90 |
| Margarine (fat content) | " " | 303 | 499 | 465 | 600) | | | |
| Shortening | " " | 1,529 | 1,441 | 1,451 | 1,376) | | | |
| Other edible fats and oils 6/ | " " | 575 | 966 | 683 | 935) | 2,870 | 119 | 99 |
| Total fats and oils 7/ | " " | 6,201 | 6,617 | 6,214 | 6,878 | 6,610 | 107 | 96 |
| Fruits | | | | | | | | |
| Fresh: | | | | | | | | |
| Citrus | " " | 6,870 | 9,931 | 9,296 | 9,992 | 9,400 | 137 | 94 |
| Apples (commercial) | " " | 4,384 | 2,415 | 3,936 | 3,900) | 9,150 | 99 | 97 |
| Other (excl. melons) | " " | 4,847 | 5,308 | 5,574 | 5,565) | | | |
| Processed: | | | | | | | | |
| Canned fruit | " " | 1,705 | 1,905 | 3,083 | 2,651 | 8/ | - | - |
| Canned fruit juices | " " | 345 | 1,804 | 2,292 | 2,016 | 8/ | - | - |
| Frozen | " " | 106 | 447 | 523 | 385 | 8/ | - | - |
| Dried | " " | 1,111 | 1,015 | 1,014 | 1,203 | 8/ | - | - |

- Continued

Table 7.- Production of major food commodities, calendar years, 1935-39 average, 1945, 1946, 1947 and forecasts for 1948 with percentage comparisons 1/ - Continued

| Commodity | Unit | Average 1935-39 | 1945 | 1946 | 1947 Prel. | Forecasts for 1948 | 1948 as a percentage of 1935-39 | 1948 as a percentage of 1947 |
|---|---|---|---|---|---|---|---|---|
| Vegetables | | | | | | | | |
| Fresh 9/ | Mil.lb. | 30,520 | 35,607 | 38,946 | 35,675 | 38,000 | 125 | 107 |
| Canned 10/ | " " | 4,084 | 6,553 | 7,662 | 6,311 | 8/ | - | - |
| Frozen | " " | 11/ 78 | 308 | 450 | 376 | 8/ | - | - |
| Potatoes | Mil.bu. | 356 | 419 | 484 | 384 | 8/ | - | - |
| Sweetpotatoes | " " | 68 | 65 | 66 | 57 | 8/ | - | - |
| Dry edible beans 12/ | Mil.lbs. | 1,360 | 1,195 | 1,474 | 1,573 | 8/ | - | - |
| Canned soups | " " | 684 | 977 | 1,434 | 1,000 | 8/ | - | - |
| Canned baby foods | " " | 48 | 422 | 462 | 400 | 8/ | - | - |
| Sugar, raw basis | 1,000 sh.tons | 1,948 | 1,667 | 1,900 | 2,159 | 2,400 | 123 | 111 |
| Grains | | | | | | | | |
| Wheat | Mil.bu. | 759 | 1,108 | 1,153 | 1,365 | 8/ | - | - |
| Rye | Mil.bu. | 44.9 | 24.0 | 18.9 | 26.0 | 8/ | - | - |
| Rice, milled | Mil.lbs. | 1,340 | 2,045 | 2,044 | 2,207 | 8/ | - | - |
| Corn, grain only | Mil.bu. | 2,050 | 2,594 | 2,990 | 2,153 | 8/ | - | - |
| Oats | " " | 1,045 | 1,536 | 1,498 | 1,216 | 8/ | - | - |
| Barley | " " | 239 | 267 | 262 | 279 | 8/ | - | - |
| Peanuts | Mil.lb. | 1,229 | 2,042 | 2,038 | 2,252 | 8/ | - | - |

1/ Calendar year basis except for fresh citrus fruit for which the season begins in the fall of the previous year; dried fruits which are on a pack-year basis; rice on a marketing year. 2/ The production of total milk for human consumption given here differs from total farm production of milk in that the former excludes milk fed to calves but includes off-farm production while the latter excludes off-farm production but includes milk fed to calves. Milk fed calves and milk produced off farms are usually of approximately equal volume. 3/ Excluding full skim, cottage, pot, and bakers' cheese. 4/ Fluid milk equivalent for fresh use. 5/ Excluding amount used in manufactured products. 6/ Represents fats used in cooking and salad oils, salad dressing, mayonnaise, bakery products and other minor uses such as fish canning. 7/ Fat content basis except for butter which is on an actual weight basis. 8/ Not available. 9/ Estimates of all vegetables and melons other than potatoes and sweetpotatoes include reported commercial production for fresh market shipments plus rough estimates of quantities produced in market gardens for fresh sale and farm gardens for home use. Excludes town garden production. 10/ Includes asparagus, beans (lima), beans (snap), beets, carrots, corn, hominy, kraut (including bulk), peas, pickles (including bulk), pimientos, Irish potatoes, sweet potatoes, pumpkin and squash, tomatoes, tomato pulp, and tomato juice, tomato sauce, paste, and catsup and chili sauce, mixed vegetables. 11/ Average 1937-39. Data prior to 1937 are not available. 12/ Cleaned basis.

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Table 8. - Retail food prices and total consumer price index United States, 1940-46 and 1947-48 by months
(Index numbers 1935-39 = 100)

| Year and month | Meats 1/ | Eggs | Dairy products 2/ | Fats and oils 3/ | Cereals and bakery products | Fruit and vegetables: Fresh | Fruit and vegetables: Canned | Fruit and vegetables: Dried | Sugar and Sweets | Beverages | All foods | Consumer price index |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1940 | 96 | 94 | 101 | 82 | 97 | 97 | 92 | 101 | 97 | 92 | 97 | 100 |
| 1941 | 108 | 112 | 112 | 94 | 98 | 104 | 98 | 107 | 106 | 102 | 106 | 105 |
| 1942 | 126 | 136 | 125 | 120 | 105 | 133 | 122 | 136 | 126 | 122 | 124 | 116 |
| 1943 | 134 | 162 | 135 | 126 | 108 | 178 | 131 | 159 | 127 | 125 | 138 | 124 |
| 1944 | 130 | 153 | 134 | 123 | 108 | 177 | 130 | 166 | 126 | 124 | 136 | 126 |
| 1945 | 131 | 164 | 134 | 124 | 109 | 188 | 130 | 168 | 126 | 125 | 139 | 128 |
| 1946 | 161 | 169 | 165 | 152 | 125 | 191 | 141 | 190 | 144 | 140 | 160 | 139 |
| 1947 | 217 | 201 | 186 | 198 | 155 | 201 | 166 | 263 | 180 | 187 | 194 | 159 |
| Jan. | 199 | 182 | 190 | 202 | 143 | 184 | 174 | 269 | 176 | 178 | 184 | 153 |
| Feb. | 197 | 170 | 183 | 201 | 144 | 189 | 173 | 270 | 178 | 183 | 182 | 153 |
| March | 208 | 175 | 188 | 219 | 148 | 199 | 173 | 271 | 179 | 187 | 190 | 156 |
| April | 203 | 176 | 179 | 228 | 153 | 201 | 173 | 270 | 179 | 190 | 188 | 156 |
| May | 204 | 179 | 172 | 200 | 154 | 210 | 172 | 268 | 179 | 189 | 188 | 156 |
| June | 217 | 183 | 172 | 188 | 155 | 208 | 170 | 263 | 180 | 181 | 190 | 157 |
| July | 220 | 203 | 179 | 182 | 155 | 204 | 168 | 264 | 180 | 181 | 193 | 158 |
| Aug. | 228 | 212 | 184 | 178 | 156 | 202 | 166 | 263 | 180 | 182 | 196 | 160 |
| Sept. | 241 | 236 | 195 | 177 | 158 | 202 | 157 | 261 | 181 | 187 | 204 | 164 |
| Oct. | 236 | 233 | 190 | 190 | 160 | 201 | 155 | 256 | 182 | 191 | 202 | 164 |
| Nov. | 227 | 225 | 198 | 196 | 168 | 205 | 156 | 252 | 183 | 195 | 203 | 165 |
| Dec. | 227 | 236 | 205 | 208 | 170 | 212 | 158 | 255 | 184 | 198 | 207 | 167 |
| 1948 | | | | | | | | | | | | |
| Jan. | 238 | 214 | 206 | 209 | 173 | 216 | 158 | 257 | 183 | 202 | 210 | 169 |

Index numbers from Bureau of Labor Statistics and rounded to the nearest whole number by Bureau of Agricultural Economics.
1/ Includes chicken and fish. 2/ Includes butter. 3/ Excludes butter.

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# THE National Food SITUATION

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

NFS-44 BAE APRIL-JUNE 1948

## THE NATIONAL FOOD SITUATION

Approved by Outlook and Situation Board, May 10, 1948

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### SUMMARY

Food will become more plentiful as supplies of many foods increase seasonally during the late spring and summer months. However, compared with the same period last year, total supplies will be slightly smaller. During these months, market supplies of meats, turkey, most of the manufactured dairy products, and fats and oils other than lard, are likely to be smaller. Summer oranges also will be in smaller supply. No significant change from the same period a year earlier is anticipated in the supplies of most other foods. Retail food prices in the next few months will decline seasonally but probably will remain above the 1947 level.

For 1948 as a whole, food consumption per capita (by United States civilians) will be slightly lower than last year but still about 12 percent above the 1935-39 level. Consumption of most dairy products, poultry, and meat will be smaller than in 1947. However, lard consumption may be greater and consumption of eggs about the same as last year. With the exception of butter, lamb and mutton, more livestock products will be consumed per person than in the prewar period 1935-39.

The report on 1948 crop intentions indicates an increase in planted acreage over last year for durum wheat, oats, barley and potatoes. No change from the 1947 planted acreage is indicated for corn. However, farmers intend to devote less of their land to the production of spring wheat (other than durum), rice, sweetpotatoes, dry edible beans, dry field peas, soybeans, peanuts and sugar beets. However, any heavy abandonment of fall sown crops may change plans for spring planting.

The per capita consumption of fresh and canned vegetables, potatoes, canned fruit and fruit juices, dried fruits and margarine is expected to be larger than last year; consumption of sweetpotatoes, fresh fruit and corn products is likely to be smaller. Not much change from 1947 is anticipated in consumption of other foods including wheat. As compared with the 1935-39 average, the consumption of major foods will be higher with the exceptions of potatoes, sweetpotatoes, dry edible beans, shortening, and wheat products.

With a continued high level of economic activity in prospect, no sharp decline in retail food prices is likely in 1948. Some seasonal declines in flush production periods are to be expected.

Exports of food in 1948 will be lower than the 1947 record in part because supplies available for export from this country will be smaller. Despite improved prospects for European crops this year, sizeable imports are again needed to allow more nearly adequate rations and also to restore stocks to reasonable working levels. Congress recently approved foreign aid measures authorizing an expenditure of 6.1 billion dollars in 1948-49. Nearly one-third of this amount may be used for the purchase of agricultural commodities in the United States.

Among the foods that are expected to be in relatively plentiful supply in most of the United States during June 1948 are: fresh cauliflower, celery, potatoes and spinach; fresh citrus fruits; canned peas, pumpkin, sweetpotatoes, tomato products, apples and apple products, citrus juices, grapefruit segments and fresh prunes; dried prunes, raisins, peaches and figs; fruit spreads; honey; peanut butter; fresh and frozen fish; and eggs.

## NUTRITIONAL REVIEW 1/

Another decline in available supplies of protein, minerals and vitamins (except ascorbic acid) probably will occur in 1948 as a result of prospective reductions in food consumption per capita. The quantity of food energy available from the food supply will be only slightly smaller than in 1946 and 1947.

Smaller consumption of ice cream and fluid milk and cream in 1947 from the record level of 1946 lowered supplies of calcium, riboflavin and protein. According to present indications this downward movement will continue this year. The drop of 13 pounds per capita (wholesale dressed weight) in meat consumption estimated for 1948 will reduce the available supply of protein, fat, niacin and thiamine.

Prospects for good supplies of fresh and canned fruits and vegetables in 1948 will partly offset the effect on Vitamin A supplies of the reduced amounts of fluid milk and cream, ice cream and sweetpotatoes.

Supplies of vitamins and minerals in 1948 will be significantly larger than in 1935-39, according to current indications. Despite the decline in meat and fluid milk and cream consumption from last year, protein supplies per capita will be about 7 percent above 1935-39. Energy value of the food supply will average only slightly higher.

1/ Prepared in cooperation with the Bureau of Human Nutrition and Home Economics.

Table 1.-Volume of agricultural production for sale and for farm home consumption and civilian per capita food consumption, 1943-47 and preliminary estimates for 1948 with percentage comparisons

(Index numbers, 1935-39 = 100)

| Item | 1943 | 1944 | 1945 | 1946 | 1947 | 1948 forecast 1/ | 1948 as a percentage of 1947 |
|---|---|---|---|---|---|---|---|
| Food grains 2/ | 116 | 148 | 155 | 164 | 196 | 193 | 98 |
| Truck crops 3/ | 124 | 137 | 142 | 157 | 138 | 141 | 102 |
| Fruits and nuts 4/ | 108 | 123 | 112 | 135 | 130 | 128 | 98 |
| Vegetables, excluding truck crops 5/ | 125 | 106 | 110 | 128 | 104 | 99 | 95 |
| Sugar crops 6/ | 81 | 81 | 94 | 103 | 108 | 103 | 95 |
| Total food crops 7/ | 116 | 129 | 130 | 145 | 147 | 144 | 98 |
| Meat animals 8/ | 150 | 155 | 147 | 145 | 144 | 130 | 90 |
| Poultry 9/ | 152 | 153 | 163 | 153 | 154 | 145 | 94 |
| Dairy products 10/ | 113 | 115 | 119 | 119 | 121 | 119 | 98 |
| Total food livestock | 138 | 141 | 141 | 138 | 138 | 130 | 94 |
| Food production | 133 | 138 | 138 | 139 | 141 | 133 | 94 |
| Agricultural production, food and non-food | 128 | 138 | 133 | 136 | 134 | 130 | 97 |
| Civilian per capita food consumption | 109 | 112 | 114 | 118 | 116 | 112 | 97 |

1/ Production estimates are based on prospective acreage, preliminary crop indications, and estimated marketings and home consumption of livestock and livestock products for the calendar year 1948.
2/ Includes wheat, rye, rice, and buckwheat.
3/ Includes truck crops for market (artichokes, asparagus, lima beans, snap beans, beets, cabbage, cantaloups, carrots, cauliflower, celery, cucumbers, eggplant, lettuce, onions, peas, peppers, spinach, tomatoes, and watermelons) and truck crops for processing (asparagus, lima beans, snap beans, beets, cabbage, sweet corn, cucumbers, peas, spinach, and tomatoes).
4/ Includes apples, peaches, pears, cherries, apricots, grapes, strawberries, cranberries, oranges, grapefruit, lemons, olives, dried California figs, fresh and dried plums, almonds, pecans, and walnuts.
5/ Includes dry edible beans, potatoes, sweetpotatoes.
6/ Includes sugar beets, sugarcane for sugar, sugarcane sirup, sorgo sirup, maple sugar, and maple sirup.
7/ Includes peanuts in addition to the other crops.
8/ Includes cattle and calves, sheep and lambs, and hogs.
9/ Includes eggs, chickens, turkeys, and broilers.
10/ Includes wholesale milk, retail milk, butterfat, farm butter, and farm consumption of dairy products.

Table 2.- Total food disappearance: Source and distribution, 1935-39 average and 1940 to 1948 1/

| Year | Source of total food: Total food disappearance | Food production | Imports | Reduction in stocks | Increase in stocks | Distribution by claimants: Civilian | Military including civilian feeding | Department of Agriculture 2/: Net purchases | Deliveries | Reduction in stocks | Increase in stocks | Commercial exports and shipments 3/ |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | Percentage of food disappearance in each year | | | | | | | |
| 1935-39 Av. | 100.0 | 93.7 | 6.4 | | .1 | 97.4 | | | | | | 2.6 |
| 1940 | 100.0 | 94.9 | 5.5 | | .4 | 97.8 | | | | | | 2.2 |
| 1941 | 100.0 | 94.7 | 5.8 | | .5 | 94.0 | 1.9 | 2.6 | 2.4 | | .2 | 1.5 |
| 1942 | 100.0 | 94.0 | 3.8 | 2.2 | | 86.8 | 6.2 | 6.2 | 4.7 | | 1.5 | 1.0 |
| 1943 | 100.0 | 95.7 | 4.8 | | .5 | 81.0 | 9.9 | 7.9 | 7.0 | | .9 | 1.2 |
| 1944 | 100.0 | 94.0 | 4.8 | 1.2 | | 78.3 | 12.9 | 6.6 | 7.1 | .5 | | 2.2 |
| 1945 | 100.0 | 94.3 | 4.9 | .8 | | 81.8 | 12.2 | 4/ 4.0 | 4.8 | .8 | | 2.0 |
| 1946 | 100.0 | 96.3 | 4.2 | | .5 | 89.7 | 3.4 | 4/ 4.4 | 5.4 | 1.0 | | 2.5 |
| 1947 | 100.0 | 95.6 | 4.9 | | .5 | 90.6 | 3.2 | 4/ 2.4 | 2.3 | | .1 | 3.8 |
| 1948 forecast | 100.0 | 94.4 | 4.8 | .8 | | 91.8 | 3.4 | 1.4 | 1.6 | .2 | | 3.4 |
| | | | | | Percentage of 1935-39 food disappearance | | | | | | | |
| 1935-39 Av. | 100.0 | 93.7 | 6.4 | | .1 | 97.4 | | | | | | 2.6 |
| 1940 | 109.7 | 104.1 | 6.0 | | .4 | 107.2 | | | | | | 2.5 |
| 1941 | 113.9 | 107.8 | 6.6 | | .6 | 106.9 | 2.2 | 3.0 | 2.7 | | .3 | 1.7 |
| 1942 | 124.6 | 117.2 | 4.7 | 2.7 | | 107.9 | 7.7 | 7.7 | 5.8 | | 1.9 | 1.3 |
| 1943 | 130.3 | 124.7 | 6.3 | | .7 | 105.7 | 12.8 | 10.3 | 9.2 | | 1.1 | 1.5 |
| 1944 | 137.5 | 129.3 | 6.6 | 1.6 | | 107.7 | 17.7 | 9.1 | 9.7 | .6 | | 3.0 |
| 1945 | 137.1 | 129.3 | 6.8 | 1.0 | | 112.3 | 16.7 | 4/ 5.4 | 6.5 | 1.1 | | 2.7 |
| 1946 | 135.2 | 130.3 | 5.6 | | .7 | 121.3 | 4.6 | 4/ 5.9 | 7.2 | 1.3 | | 3.4 |
| 1947 | 138.3 | 132.2 | 6.8 | | .7 | 125.3 | 4.4 | 4/ 3.4 | 3.3 | | .1 | 5.2 |
| 1948 forecast | 132.1 | 124.7 | 6.4 | 1.0 | | 121.2 | 4.5 | 1.9 | 2.2 | .3 | | 4.5 |

1/ The upper section of the table divides the total disappearance in each year (1) according to the source of the food, and (2) according to its distribution. Both the total disappearance figure and the breakdown are on an index number basis, that is, they represent quantities weighted by average farm prices in the period 1935-39. The disappearance figure includes both domestically produced and imported foods. The lower portion of the table contains the same data expressed as a percentage of total food disappearance in 1935-39 instead of total disappearance in each year. 2/ The quantities assigned to the Department of Agriculture are principally food for lend-lease and relief. These quantities are measured in two ways: (1) in terms of Department of Agriculture purchases from commercial channels, and (2) in terms of shipments out of the country. When measured in terms of purchases, additions to Department of Agriculture stocks included. When measured in terms of shipments, additions to stocks are shown separately. Department of Agriculture shipments were smaller than the total quantities purchased from 1941 to 1943 and stocks were built up. In 1944 to 1946, however, shipments exceeded purchases and stocks were decreased. 3/ The 1935-39, 1940-41 exports and shipments are strictly commercial. For the war years, they approximate the commercial portion as indicated by total exports and shipments less the exports assignable to the Department of Agriculture. 4/ Including transfers for relief from military stocks in U. S.

Table 3.- Apparent civilian consumption of major food commodities on a per capita basis, calendar-years, 1935-39 average, 1944, 1945, 1946, 1947 and preliminary indications for 1948 with percentage comparisons 1/

| Commodity | Average 1935-39 | 1944 | 1945 | 1946 | 1947 | Preliminary indications for 1948 | 1948 as a percentage of 1935-39 | 1948 as a percentage of 1947 |
|---|---|---|---|---|---|---|---|---|
| | Pounds | Pounds | Pounds | Pounds | Pounds | Pounds | | |
| Meats (dressed weight) - Total | 125.6 | 153.5 | 144.5 | 153.7 | 155.2 | 143-146 | 115 | 93 |
| Beef | 54.8 | 55.3 | 59.1 | 61.4 | 69.2 | 62-64 | 115 | 91 |
| Veal | 8.0 | 12.3 | 11.8 | 9.9 | 10.7 | 10 | 125 | 93 |
| Lamb and mutton | 6.7 | 6.6 | 7.3 | 6.7 | 5.3 | 5 | 75 | 94 |
| Pork (exoluding lard) | 56.1 | 79.3 | 66.3 | 75.7 | 70.0 | 66-67 | 119 | 95 |
| Poultry products | | | | | | | | |
| Eggs 2/ | 37.3 | 43.8 | 49.6 | 46.8 | 47.5 | 47.5 | 127 | 100 |
| Chicken (dressed weight) | 17.9 | 26.8 | 28.9. | 25.5 | 23.4 | 22.7 | 127 | 97 |
| Turkey (dressed weight) | 2.6 | 3.3 | 4.3 | 4.4 | 4.5 | 3.2 | 123 | 71 |
| Dairy products | | | | | | | | |
| Total milk (whole milk equivalent) | 801 | 780 | 794 | 810 | 793 | 770 | 96 | 97 |
| Cheese | 5.5 | 4.9 | 5.9 | 6.9 | 7.1 | 7.0 | 127 | 99 |
| Condensed and evaporated milk | 16.7 | 16.1 | 18.3 | 18.8 | 19.6 | 19.9 | 119 | 102 |
| Fluid milk and cream | 340 | 412 | 433 | 425 | 398 | 388 | 114 | 97 |
| Fats and oils - Total, fat content 3/ | 44.7 | 41.2 | 39.5 | 39.6 | 41.7 | 41.5 | 93 | 100 |
| Butter, farm and factory (actual weight) | 16.7 | 12.0 | 10.8 | 10.3 | 11.2 | 10.6 | 63 | 95 |
| Lard | 11.0 | 12.6 | 11.5 | 11.8 | 12.5 | 12.6 | 115 | 101 |
| Margarine (actual weight) | 2.9 | 3.9 | 4.0 | 3.8 | 5.0 | 5.4 | 186 | 108 |
| Shortening | 11.7 | 9.2 | 10.0 | 10.1 | 9.3) | 16 | 89 | 99 |
| Other edible fats & oils | 6.3 | 6.6 | 6.0 | 6.3 | 6.9) | | | |
| Fruits | | | | | | | | |
| Fresh - total | 138.7 | 143.8 | 143.8 | 140.7 | 145.9 | 141 | 102 | 97 |
| Citrus | 48.8 | 67.8 | 65.4 | 58.3 | 62.0 | 59 | 121 | 95 |
| Apples (Commercial) | 30.4 | 25.4 | 22.9 | 23.1 | 25.0) | 82 | 91 | 98 |
| Other (exoluding melons) | 59.5 | 50.6 | 55.5 | 59.3 | 58.9) | | | |
| Processed | | | | | | | | |
| Canned fruit | 14.9 | 9.3 | 14.7 | 21.1 | 18.2 | 20 | 134 | 110 |
| Canned juices | 4.0 | 9.9 | 10.3 | 16.5 | 15.1 | 16.5 | 412 | 109 |
| Frozen | .8 | 2.0 | 2.3 | 3.1 | 3.2 | 3.2 | 438 | 109 |
| Dried | 5.7 | 6.4 | 6.1 | 5.0 | 5.9 | 4/ | - | - |
| Vegetables | | | | | | | | |
| Fresh | 235 | 254 | 265 | 271 | 249 | 252 | 107 | 101 |
| Canned | 31.1 | 34.6 | 43.1 | 46.3 | 40.5 | 41.7 | 134 | 103 |
| Frozen | 5/ .4 | 1.4 | 1.7 | 2.0 | 2.6 | 2.6 | 650 | 100 |
| Potatoes | 131 | 127 | 129 | 125 | 124 | 124 | 95 | 100 |
| Sweetpotatoes | 21.4 | 19.5 | 18.8 | 18.3 | 16.5 | 15.3 | 71 | 93 |
| Dry edible beans | 8.8 | 7.7 | 7.5 | 8.6 | 8.4 | 8.0 | 91 | 95 |
| Sugar (refined) | 96.5 | 89.1 | 73.6 | 74.7 | 96.4 | 95 | 98 | 98 |
| Grains | | | | | | | | |
| Corn products: | | | | | | | | |
| Corn meal | 23 | 20 | 19 | 17 | 18 | 17 | 74 | 94 |
| Corn sirup | 7.7 | 12.1 | 12.0 | 12.0 | 12.9 | 10.5 | 136 | 81 |
| Corn starch | 1.3 | 1.4 | 1.9 | 1.9 | 1.9 | 1.7 | 131 | 89 |
| Corn sugar | 2.7 | 4.0 | 3.8 | 3.8 | 4.5 | 3.5 | 130 | 78 |
| Breakfast cereals | 1.7 | 2.b | 2.5 | 2.2 | 2.6 | 2.4 | 141 | 92 |
| Hominy | 1.2 | 1.8 | 1.7 | 1.5 | 1.8 | 1.7 | 142 | 94 |
| Oatmeal | 3.9 | 3.2 | 4.1 | 4.4 | 4.4 | 4.3 | 110 | 98 |
| Barley food products 6/ | 1.2 | 1.5 | 1.5 | 1.8 | 1.7 | 1.7 | 142 | 100 |
| Wheat: | | | | | | | | |
| Flour 7/ | 153.1 | 162.2 | 160.7 | 153.4 | 144.0 | 146 | 95 | 101 |
| Breakfast cereals | 3.7 | 3.7 | 3.7 | 3.5 | 3.6 | 3.6 | 97 | 100 |
| Rye flour | 2.2 | 2.6 | 2.6 | 1.9 | 1.7 | 1.7 | 77 | 100 |
| Rice, milled | 5.6 | 4.9 | 4.7 | 4.1 | 4.9 | 5.0 | 89 | 02 |
| Beverages | | | | | | | | |
| Coffee 8/ | 14.0 | 15.8 | 16.7 | 19.3 | 17.7 | 17 | 121 | 96 |
| Tea | .67 | .53 | .59 | .53 | .57 | .5 | 75 | 88 |
| Cocoa beans | 4.4 | 3.6 | 4.0 | 4.1 | 4.1 | 4 | 91 | 98 |
| Peanuts (shelled) | 4.4 | 6.3 | 6.3 | 5.2 | 5.0 | 4/ | - | - |

Population estimates used to obtain per capita consumption figures are official Census estimates of total population adjusted for underenumeration of children under 5 and for military personnel not eating out of civilian supplies.

1/ Data on calendar year basis except for dried fruits which are on a pack year basis; fresh citrus fruits and peanuts on a crop year basis, rice on August 1 year. All years begin in year indicated except for fresh citrus, which begins in October of the previous year and rice which begins in August of previous year. 2/ In terms of number of eggs, the apparent per capita consumption was 298 in 1935-39, 350 in 1944, 397 in 1945, 374 in 1946, 380 in 1947 and 380 indicated for 1948. 3/ Computed from unrounded data. 4/ Not available. 5/ Average 1937-39. Data prior to 1937 are not available. 6/ All barley food products in terms of malt equivalent. 7/ Includes white, whole wheat, and Semolina flour. 8/ Green bean basis.

## Retail Food Prices

Retail food prices during the past few months have been relatively stable. The Bureau of Labor Statistics retail food price index for March was 202.3, only 1.2 percent below the February level. Fresh fruits and vegetables prices declined an average of 3.5 percent, somewhat more than seasonal. The price of meats and beverages increased somewhat, but prices of canned fruits and vegetables remained the same. For all other foods surveyed, moderate declines were reported.

The course of retail food prices during the remainder of the year will depend to a considerable extent on the size of crop production both in this country and abroad. The continuation of a high level of economic activity and no material change in the pattern of U. S. consumer expenditures are likely to preclude any sharp downward turn in retail food prices in 1948. Among the influences that will tend to maintain economic activity in this country are the recent federal income tax reduction which may add as much as 5 billion dollars to the spendable income of consumers this year, authorization of funds for foreign aid, and the probable increase in funds to be used for national defense.

Table 4.- Nutrients available for civilian consumption per capita per day, calendar years, 1935-39 average, 1943 to 1947 and preliminary indications for 1948 with percentage comparisons 1/

| Nutrients | Units | Average 1935-39 | 1943 | 1944 | 1945 | 1946 | 1947 Prel. | 1948 Indications | 1948 as a percentage of 1935-39 | 1948 as a percentage of 1947 |
|---|---|---|---|---|---|---|---|---|---|---|
| Food energy | Cal. | 3,250 | 3,400 | 3,470 | 3,370 | 3,380 | 3,420 | 3,340 | 103 | 98 |
| Protein | Grams | 89 | 99 | 100 | 103 | 100 | 98 | 95 | 107 | 97 |
| Fat | Grams | 132 | 142 | 145 | 138 | 145 | 143 | 139 | 105 | 97 |
| Carbohydrate | Grams | 428 | 430 | 440 | 428 | 418 | 433 | 428 | 100 | 99 |
| Calcium | Grams | .90 | 1.02 | 1.04 | 1.08 | 1.12 | 1.07 | 1.04 | 116 | 97 |
| Iron | Mg. | 13.8 | 16.7 | 18.5 | 19.0 | 18.6 | 18.3 | 17.8 | 129 | 97 |
| Vitamin A | I.U. | 8,100 | 9,200 | 9,400 | 9,800 | 9,300 | 8,700 | 8,500 | 105 | 98 |
| Thiamine | Mg. | 1.54 | 2.19 | 2.28 | 2.24 | 2.26 | 2.15 | 2.11 | 137 | 98 |
| Riboflavin | Mg. | 1.86 | 2.20 | 2.48 | 2.55 | 2.56 | 2.45 | 2.38 | 128 | 97 |
| Niacin | Mg. | 15.4 | 19.1 | 21.6 | 21.9 | 21.5 | 20.7 | 20.1 | 131 | 97 |
| Ascorbic acid | Mg. | 115 | 126 | 132 | 139 | 135 | 128 | 129 | 112 | 101 |

1/ Data computed by the Bureau of Human Nutrition and Home Economics on the basis of estimates of apparent civilian consumption (retail basis) including estimates of consumption from urban gardens, supplied by the Bureau of Agricultural Economics. No deductions have been made in the nutrient estimates for the loss of waste in the home or for the destruction or loss of nutrients during the preparation of food. Deductions have been made for inedible refuse. The data for iron, thiamine, riboflavin, and niacin include the amounts of these nutrients added to white bread and flour under the enrichment program. The 1947 and 1948 estimates assume that voluntary enrichment will continue at the rate required under WFO-1.

Exports of agricultural products will be reduced from the 1947 record level partly because supplies available for export from the United States will be smaller. Even with favorable European crop prospects in 1948, sizeable imports are again needed to allow more adequate rations and also to re-establish stocks to reasonable working levels. The United States Congress has approved the European Recovery Program and associated foreign aid measures which authorize an outlay of 6.1 billion dollars in 1948-49. These funds will be used by foreign countries for the procurement of food, raw materials, machinery and equipment in the United States and other countries. Nearly one third of the amount authorized will be used for the purchase of agricultural commodities in the United States and will have a supporting effect on domestic prices.

## COMMODITY REVIEWS

### Meats

So far this year meat supplies have been moderately smaller than in the early part of 1947. Fewer hogs on farms and fewer cattle and lambs on grain feed at the first of the year reduced the rate of meat output. Hogs from the 1947 spring pig crop were marketed earlier than usual last fall and winter. The number of cattle and lambs being fed grain was considerably below a year earlier because of smaller feed supplies and higher feed prices. In recent weeks the slaughter in federally inspected plants has been reduced partly because of the strike of packing house workers but also due to the smaller numbers of livestock marketed. Non-federally inspected plants have been less affected by the strike and may have expanded their output somewhat. Any shift to non-inspected slaughter tends to reduce meat supplies for larger urban areas which usually get most of their meat from inspected sources.

Prospects are that meat supplies will decline more than usual this summer, reaching the year's low point in the late summer or early fall. The short grain supplies remaining from the 1947 crops are likely to result in both early shipment of the 1947 fall pigs this spring and the holding back of the 1948 spring pigs in order to fatten them on supplies from the new grain crops. The 1948 spring pig crop is indicated to be about 10 percent smaller than that of the previous year. This reduction will be reflected in the smaller than usual increase in meat supplies from the third to the fourth quarter of the year. The 1948 fall pig crop may be the smallest in ten years if hog producers react in their usual manner to the present below average hog-corn price ratio. This will mean smaller supplies of pork next spring and summer.

Some reduction from 1947 supplies is also indicated for beef and lamb. The number of cattle and calves on farms January 1, 1948 was 8 percent less than the record number held at the beginning of 1945. Furthermore the number of cattle on grain feed for market in the corn belt on April 1 was 25 percent smaller than a year earlier so that the proportion of beef from grain fed animals will be much smaller during the coming months than in 1947. The 1948 early spring lamb crop was 10 percent smaller than a year earlier and the smallest on record. This is already being reflected in reduced lamb slaughter, which is expected to continue below the previous year's rate during the rest of the year since the late crop is not expected to be as large as that of 1947. The number of breeding ewes on farms was again reduced last year.

May 1 stocks of all meats in commercial cold-storage warehouses and meat-packing plants totaled 864 million pounds, 149 million more than a year earlier. Stocks were reduced 104 million pounds in April compared with the average April reduction of 38 million pounds.

Exports and shipments of meat from the United States continue small, at less than 1 percent of production. Allocations of carcass meat for export are now limited to the rate of about 15 million pounds (dressed meat basis) per quarter. In addition, shipments of meat to United States territories have been running 15 to 25 million pounds per quarter, dressed meat basis. It is anticipated that little if any red meat will be shipped from the United States to Western Europe under the ECA program. However, large shipments of horsemeat from the United States will continue. It is estimated that about 80 million pounds of horsemeat will be shipped in the 1947-48 fiscal year, mostly to ERP countries, compared with prewar average shipments of less than 2 million pounds per year.

United States imports of meat in 1947 totaled 65 million pounds, carcass weight basis, compared with 21 million in 1946 and 269 million in 1941. Imports were limited by import controls in the first half of 1947. January-March 1948 imports totaled 42 million pounds, carcass weight basis.

Meat prices rose sharply in late March and April. Wholesale prices of beef and lamb in early May were at or near the record highs reached in early January. Pork prices were only slightly lower. Because of restricted slaughter capacity, wholesale prices of meat rose more than live animal prices and generally were high relative to live animal prices during the second half of March and in April. Meat prices at retail during the packinghouse workers' strike have reflected local scarcities and in some areas reached new records. Meat prices at wholesale may even increase above current high levels during the summer and early fall period of seasonally small supplies. Prices of pork products and of better grades of beef are most likely to advance because of smaller production in prospect. Prices of lamb and lower grades of beef may decline from present high levels with increased marketings of spring lambs and grass cattle this summer and fall. Reduced total meat supplies will be a strong price supporting factor for all meats.

Fish

The civilian consumption of fresh and frozen fish is expected to be higher in 1948 than last year. The demand for canned fish at prevailing prices is likely to remain strong as in the past few years. Commercial fishing and fish freezing operations probably will exceed the 1947 level. Nothing indicates at this time that the 1948 pack of canned fish will be larger than last year. During the first quarter of 1948, despite many distributors' reports of price consciousness on the part of the consumers, the quantity of fresh and frozen fish marketed was larger than a year earlier. Retail and wholesale prices on the average have been relatively stable this year despite variations for some species of fresh and processed fish. The Bureau of Labor Statistics retail price index of fresh and frozen fish was 274.4 in March, about 2 points below the nine year record reached in February 1948.

Stocks of fresh and frozen fish on May 1 totaled 62 million pounds, about 70 million pounds or 53 percent below the carry-over on January 1. Stocks on May 1, 1947 amounted to almost 64 million pounds. The movement out of storage during the first quarter of 1948 probably would have been still greater if landings for the fresh fish market and if the suppliesof frozen fish both out of current production and from abroad had not been larger than in the first quarter of 1947. Trade sources indicate that stocks of canned fish at the packer level are slightly higher than they were last year but still relatively small.

Imports of fresh and frozen groundfish fillets (cod, haddock, hake, cusk, pollack, rosefish) between January 1 and May 1 amounted to 16.6 million pounds. This quantity is more than twice the volume of imports during the first four months of 1947. Witha favorable domestic market demand at current prices, imports of fresh and processed fish this year could exceed the 1947 level, because tariff rates are lower this year and demand for dollars is very strong.

Total fish exports for 1948 are expected to be at least as large as the 1947 total. Exports of canned fish, especially salmon and sardines, could increase under the European Recovery Program.

Military requirements for canned salmon, sardines and tuna this year are currently estimated at about 27 million pounds as compared with takings of almost 9 million pounds in 1947.

Poultry and Eggs

Egg consumption since the first of the year has been averaging about the same as in the early part of 1947 and is not expected to differ much from 1947 rates during the rest of the year. Although egg production later this year may run 3 to 8 percent below the latter part of 1947, substantial supplies will be available from commercial stocks which have been accumulated this spring. Egg consumption in 1948 will be about as large as the near-record 380 eggs per person achieved in 1947. With meat supplies smaller than in 1947 and continued heavy demand for high protein foods, 1948 egg prices probably will average somewhat higher than last year.

Supplies of chicken from farm flocks will be smaller in the last half of 1948 than in the comparable period of 1947. The number of chicks raised for flock replacement is about 10 to 15 percent less. Part of this reduction will be offset by a larger output of commercial broilers and the moderately larger stocks available from cold storage. Chicken prices will be about the same as last year.

About one-fifth fewer turkeys are being raised this year than in 1947, when numbers were the lowest since 1938. Cold storage stocks of turkey are only about half as large as last year's extremely large holdings. Accordingly, turkey supplies for the 1948 holiday season will be the lowest in a decade. Retail prices are likely to set a new record and be at least 10 percent higher than in 1947.

Dairy Products

The consumption of fluid milk and cream in the first few months of this year apparently has been nearly as great in total as in the corresponding months a year earlier, although smaller on a per person basis. With little change in total fluid milk and cream consumption, the 4 percent decline in production of milk on farms the first quarter of 1948 compared with a year earlier, resulted in a decline in the production of manufactured dairy products, especially in butter and cheese.

The principal factor in the reduction in milk output was the smaller number of cows on farms. Output per cow is now about equal to that of a year earlier and may be higher than a year earlier during the next few months. With average or better crops and pastures this season, total milk flow probably will increase relative to that of a year earlier and later in the year may equal or even exceed the 1947 output.

Milk used in manufacturing in the first three months of 1948 constituted about 38 percent of production on farms, a record low for the period. In the first quarter of 1947 about 42 percent was so used. Butter production fell about 18 percent from the January-March 1947 rate, cheese 16 percent, evaporated milk 6, ice cream 11. Output of dried whole milk was up 5 percent and condensed milk (case goods) up 16 percent. On the basis of prospective prices for the various items, it appears that the production pattern of manufactured products will continue to be sharply different from prewar but not greatly different from that of 1947. Production of nearly all items will continue under a year earlier, at least for the next several months.

Although this is the season when milk production is heaviest, strong demand for dairy products will be reflected in substantially higher prices for milk and milk products than a year earlier.

In recent weeks, prices for some manufactured products have increased contra-seasonally, and prices for fluid milk have declined much less so far this year than in the comparable period of 1947. The retail price of milk in 25 major cities at the beginning of April was 20.6 cents per quart, about 10 percent higher than a year earlier. In early May, wholesale prices of major manufactured dairy products were from one-fifth to two-fifths above a year ago.

With prospects for comparatively large exports of dairy products this year and smaller total milk production, per capita consumption of milk products (fluid milk equivalent) probably will be less than in 1947 by about 20 pounds, or 3 percent. At least half of this decline in milk equivalent will be in butter. Consumption of fluid milk and cream and ice cream may average slightly lower this year than in 1947 as a whole. Consumption per person of evaporated and condensed milk will be at record or near-record levels through 1948. The export demand for nonfat dry milk continues strong; however, with a probable decline from last year in domestic production and with domestic consumption likely to continue at about the 1947 level, exports will be smaller in 1948 than last year.

Economic aid to Europe is likely to assure exports of dairy products at a higher level than prevailed for the comparable period after World War I, but below the recent war and postwar highs. In 1946 and 1947, the combined takings by the ERP countries accounted for the bulk of domestic dairy exports, with the proportion of totals for individual products ranging from 47 percent for non-fat solids to 96 percent for cheese.

Fats and Oils

The total supply of edible fats and oils for domestic consumption in the late spring and early summer is likely to be somewhat below that of the comparable period of 1947. Total output of edible fats and oils during these months will be considerably smaller. Partly offsetting this, stocks at the present time are moderately larger than a year ago and exports during the summer probably will be smaller than in 1947. The current supply of lard for domestic consumption is larger than a year ago but production is likely to be substantially lower this summer than last. Creamery butter production is running about 20 percent below a year ago. A tight supply situation in edible vegetable oils, reflected in recent high prices, probably will continue until supplies are available from the crushings of the 1948 oilseed crops.

Production of the primary fats and oils used mainly in food products was slightly smaller in the first 3 months of 1948 than a year earlier. Decreases in production of lard and butter more than offset an increase in output of vegetable oils. Currently, the prolonged strike in meat-packing plants is diverting part of hog slaughterings to plants not under Federal inspection, where the yield of lard per hog slaughtered is less than in inspected plants. Production of vegetable oils in April-September probably will total materially less this year than last, reflecting a more pronounced early-season peak in crushings this year.

Output of vegetable oils in late 1948 will depend mainly on the size of the 1948 soybean and cottonseed crops. Farmers' intentions March 1 indicated a smaller acreage of soybeans to be planted this year than last, but with an average yield per acre the crop this year would be slightly larger. The first official report on cotton acreage will be made in July.

Factory and warehouse stocks of edible fats and oils April 1 this year totaled 739 million pounds (crude basis) compared with 707 million pounds a year earlier. Lard inventories were up almost 20 percent, but stocks of edible vegetable oils were only 3 percent larger than a year earlier.

Tentative international allocations of fats and oils for 1948, announced last January, recommended an export of 516 million pounds of edible fats and oils from the United States compared with actual exports of 640 million pounds in 1947. These figures include oil equivalent of shelled peanuts exported for crushing abroad, which amounted to 75 million pounds in 1947 and probably will exceed 100 million pounds in 1948. Firm allocations of edible fats and oils (excluding oil equivalent of peanuts) by USDA for the first half of 1948, plus estimated quantities allocated in 1947 but not shipped until after the end of the year, total 106 million pounds compared with 71 million pounds a year earlier.

Wholesale prices of edible oils and fats in the first four months of 1948 averaged about 5 percent higher than in calendar year 1947. These prices in the last 8 months of 1948 are likely to continue at an average slightly higher than in 1947, as prospective supplies are slightly smaller and consumer incomes remain high. However, if 1948 oilseed crops should prove to be materially larger than in 1947, prices of edible oils and fats probably would decline when crushings of the new crop begins.

Fruit

Prospects are good for continuing large supplies of fruit in 1948. Although a moderately large crop of deciduous fruits seems likely, production of certain important fruits probably will be smaller this year than last. Supplies of citrus fruits from the 1947-48 crop are large for this time of year. Stocks of canned citrus juices continue abundant, those of many canned deciduous fruits and dried fruits are large, but stocks of frozen fruits are smaller than a year ago. Per capita consumption of fruit is expected to continue at or near the high rates of the past year.

Although deciduous fruit trees came through the hazards of winter in generally good condition, trees in many areas are now passing through the critical spring period when the set of fruit and hence the probable size of the crop is determined. Total production of all deciduous fruits in 1948 is not expected to be as large as in 1947, when it slightly exceeded 10 million tons, fresh basis. Production of peaches in the 10 Southern early peach States will be about one-third smaller than in 1947, judging from May 1 conditions. The crop is about 3 weeks earlier than last year and slightly earlier than usual. Production of apricots in California, where most of the national crop is grown, is expected to be much larger than last year's small crop.

Supplies of strawberries will be seasonally large in May and June from a late spring crop about 8 percent larger than in 1947. The early spring crop was moderately larger than in 1947, but the mid-spring crop was slightly smaller.

Supplies of oranges during May and June will be larger than in 1947, but in summer they will be moderately smaller than the year before. California Valencias make up most of the summer supplies. With movement of Florida and Texas grapefruit slower than in the 1946-47 season, supplies will be unusually large in May and June and possibly also in early July, when the season for grapefruit from these states will close. Supplies will be seasonally low during the summer, coming almost entirely from California. Supplies of lemons will be moderately smaller in late spring and summer than in the same period of 1947. Nearly 50 percent more oranges but only slightly more grapefruit have been processed thus far this season than last. Prices for oranges and grapefruit continue considerably lower than a year ago.

With the large pack of canned citrus now about completed, supplies will continue abundant. Stocks of some canned deciduous fruits, especially peaches and pears, are considerably larger than a year ago, but those of apricots are moderately smaller. Stocks of all frozen fruits on May 1 were about 23 percent smaller than a year earlier. Dried fruits from the large 1947 pack continue plentiful.

Vegetables

Spring vegetable supplies for fresh market from commercial areas are expected to total about 6 percent less than last year, but 12 percent above the 1937-46 average. These supplies are marketed largely in April, May and June. The spring crop of green peppers is estimated to be more than 2 1/2 times last year and eggplant more than double. Substantial reductions from last year, ranging from 19 to 28 percent, are indicated for lettuce, snapbeans, beets, carrots, cantaloups and green peas. These crops also will be considerably below average, except carrots and lettuce.

Prospective acreage for summer harvest is moderately lower this year for watermelons but slightly larger for cabbage and onions. Early fall cabbage acreage planned is up 17 percent with both domestic and Danish types showing an increase.

Retail prices in the first quarter of this year were moderately to considerably higher than a year earlier for cabbage, carrots, green (snap) beans, and dry onions, but lower for lettuce and spinach. Prices received by farmers for truck crops in general were higher than a year earlier for most of the first quarter.

Total supplies of commercially frozen and canned vegetables are expected to be sufficient in 1948 for consumption to continue at the record or near-record rates of the last few years. The 1947 commercial packs of most items were considerably smaller than the record packs of 1946. Some increases in total pack from last year are expected in 1948. According to intentions of commercial processors in March, acreages planted this year for commercial canning and freezing in general will approximate those of last year. Smaller acreages are indicated for snap beans, cucumbers for pickles, and tomatoes. But slightly larger acreages are planned for sweet corn, pimientos, green lima beans and green peas, and considerably larger acreage for beets and cabbage for kraut (contract acreage only). With average yields and abandonment, production of each of these commercial processing crops would be larger than last year, except for cucumbers and tomatoes. Production of spinach for processing in California and Texas has been estimated at about 90 percent of the 1947 crop.

Total stocks of 5 major canned vegetables including tomato juice in the hands of packers and wholesale distributors on April 1 were about the same as a year earlier, but less was held by wholesalers and more by packers. Canned tomato supplies from the old pack are substantially larger this spring compared with last year's short supplies. Stocks of frozen vegetables in cold storage on May 1 this year were 29 percent smaller than the 1947 record May holdings.

Market supplies shift from primarily old potatoes to primarily new potatoes about mid-May. The potatoes from the earliest areas this year have been somewhat delayed by weather in the South, but California's early potatoes are maturing on schedule. Supplies of storage potatoes from the 1947 crop have been more than ample in the East, but short in the West. Retail prices for potatoes in large cities as reported by the Bureau of Labor Statistics averaged 84.2 to 88.7 cents per peck in the first 3 months of this year, compared with 63.8 to 67.9 cents for the same months a year earlier.

Supplies of potatoes from early and intermediate States this year may be more than the market will absorb at support prices. The commercial early production in California, where about three-fourths of the late spring crop will be produced, is expected to be about one-fifth larger this year than last. Prospective commercial early acreage for summer harvest is 2 percent larger than last year. Prospective acreage in the 8 intermediate States (including the commercial early acreage grown in these States) is 3 percent smaller than last year. In the 29 late states total acreage may be 2 percent larger than last year, according to farmers' intentions in March.

Sweetpotato supplies from the 1947 crop are virtually exhausted, and new crop supplies will be light until the second half of July. Despite considerably smaller supplies from the 1947 crop, prices for sweetpotatoes have been generally lower thus far in 1948 than a year earlier. Retail prices of sweetpotatoes, as reported by the BLS in March, averaged 10.2 cents per pound, as against 10.8 cents in March 1947. Acreages planned by farmers for 1948 indicate that this year's crop of sweetpotatoes, and consequently consumption per capita, probably will be smaller than last year.

Production of dry edible beans and peas this year is expected to be slightly lower than last year. Domestic consumption and use of beans and peas by the U. S. military forces in 1948 is expected to be about as large as in 1947. As a result, any increase in exports and shipments in 1948 over 1947 could be accomplished only by reducing stocks at the end of the 1948 crop year below the low level expected at the end of the 1947 crop year.

Sugar

The import and marketing quotas established under the Sugar Act of 1948 together with available stocks will provide as much sugar this year as in 1947, when they provided United States civilians with about 96 pounds (refined basis) per person. During the first quarter of 1948, the demand for sugar was lower than had been anticipated. Supplies moved slowly, stocks accumulated at the primary distributor level, and both retail and wholesale prices declined. As a result, the total marketing and import quota established in January in accordance with the Sugar Act of 1948 was recently reduced from 7.8 to 7.5 million short tons (raw basis). Since the quotas for domestic growers and the Republic of the Philippines are fixed by the Act, the reduction was applied entirely against the import quotas for all other off-shore sugar producing areas. The quota on Cuban sugar received the heaviest reduction, 9 percent; for all other foreign producers the cutback was 6 percent.

In the first 3 months of the year, continental United States producers marketed about 20 percent less sugar than the 397 thousand short tons (raw basis) moved during the same period in 1947. In the four months of 1948, about 1,453 thousand short tons (raw basis) off-shore produced sugar entered or were in transit to the United States. This quantity is about 17 percent below the amount which was imported during the same part of last year.

The U. S. Department of Agriculture recently contracted to purchase outside of quotas, one million short tons of 1948-crop Cuban raw sugar and about 37,000 short tons of raw sugar from Peru. This sugar will be used to meet the requirements of Army programs for the feeding of people in the occupied areas both in Europe and the Orient, and for other areas which are receiving aid from the United States.

Food Grains

Supplies of cereal products for domestic consumption have continued plentiful. With relatively good crops of food grains in prospect in the United States and in other parts of the world, the tight world food situation of the past 2 or 3 years is likely to ease by fall and may result in some downward adjustment in prices.

In 1947-48 civilian consumption of wheat food production has been running lower than in recent years. The total use of wheat for civilian food in 1947-48 is estimated at about 490 million bushels compared with 494 million bushels in the previous crop year. Despite the heavy demand and high prices for meats and other livestock products, and the short crop of feed grains, the highest wheat prices on record have contributed to holding the feed use of wheat in 1947-48 down to about 200 million bushels. Seed and industrial use of 92 million, shipments to territories of 4 million and military food use of 5 million brings total domestic use to about 786 million bushels. The export program for wheat for 1947-48 was increased on April 26 to 482 million bushels, 88 million more than 1946-47 exports. Carry-over stocks on July 1, 1948 may total about 175 million bushels, or nearly 100 million bushels higher than the extremely low stocks of a year earlier.

Prospects for the 1948 wheat crop are much better than had been expected during the droughts last fall; in fact it appears possible that the crop might exceed 1,100 million bushels and be the third largest of record. Such a crop and a domestic use next year of about 775 million bushels would provide about 325 million bushels either for export in 1948-49 or for addition to carry-over stocks on July 1, 1949. Exports including those under the European Recovery Program are expected to be at least 300 million bushels.

Rye supplies during the past year have been materially larger than in 1946-47 but there has been little change in use of rye for food, about 6 million bushels. Feed use is estimated at 6 million bushels, and seed and alcohol at 5 million bushels each. Exports may total between 2 and 3 million bushels. The amount on hand on July 1 appears likely to be somewhat larger than the very low quantity of 2 million bushels in stock on July 1, 1947. Despite larger supplies, rye prices have been sharply higher, reflecting the generally tight grain situation. Some price decline appears likely, on the basis of the generally improved food grain situation in the world, although rye prices are expected to continue at high levels.

Civilian food use of rice during the 1947 crop year may turn out to be slightly larger than in the preceding year, but on a per capita basis rice consumption will still fall below the prewar average of 5.6 pounds. Domestic food and nonfood use of rice may total about 1,230 million pounds (milled rice equivalent). Exports are now estimated at approximately 890 million pounds and shipments to territories at about 320 million pounds. Only nominal stocks will remain at the end of the crop year. Rice prices have been higher than at any time on record with the exception of 1919 and 1920. The outlook appears favorable for another large rice crop this year. Farmers intended on March 1 to plant 1,666,000 acres compared with planted acreage of 1,687,000 in 1947. With continued heavy export demand, rice prices are likely to be at a high level although probably somewhat below 1947-48 prices. No major change in supplies for domestic food consumption in 1948-49 appears likely.

Consumer demand for corn food products has continued strong, but the output has been smaller than a year ago. The wet-processing industry which produces corn starch, sugar and sirup used only about 59 million bushels of corn during October-March period compared with 73 million bushels in the comparable months of 1946-47. Such use is expected to continue smaller than the year before and to total around 110 million bushels for the current marketing year compared with 143 million bushels in 1946-47. Prices of corn products advanced sharply through most of 1947, reflecting increasing corn grain prices. Following the break in corn prices they declined considerably in February and March. Even in March the prices of corn meal, sugar and sirup were still about a third higher than in March 1947. Prices of corn products probably will continue high until the 1948 corn crop is harvested in the fall.

During the October-March period, domestic consumption of corn for food and nonfood use was 11 percent smaller than a year earlier, reflecting the much smaller 1947 corn supply. Utilization for the entire year is expected to be down about 15 percent from 1946-47. Exports of corn probably will total less than 5 million bushels during the 1947-48 crop year compared with the 127 million bushels which went out last year.

The supply of oats has been large enough to maintain oats processing at the level of recent years, but oats prices are about one-third higher than in the early months of 1947. Exports of oats are expected to be only half as large as in 1946-47, and carry-over on July 1 probably will be about 100 million bushels less than on July 1, 1947.

The barley supply of 1947-48 was a little larger than in the previous year and barley utilization has been a little larger during the current marketing year than in 1946-47. The quantity used for food probably will be about as large this year as last. Malt prices, however, are nearly one-fourth higher than a year ago reflecting the higher prices of barley this year than last resulting from the current strong demand and smaller total feed grain supplies. Prices of both oats and barley are expected to decline seasonally late this spring and early in the summer if the 1948 crops are about average.

Larger supplies of corn, oats, and barley are in prospect for 1948-49 than in 1947-48 if yields are about average on the 1948 intended acreages. Larger supplies of the feed grains would permit increased production of livestock and livestock products, and also make available more corn for processing into foods in 1948-49 than during the current season. With average production of these grains this year, prices of feed grains probably will decline more than usual late this summer and will be considerably lower in the latter part of 1948 than in the same period of 1947. Increased supplies also would permit somewhat larger exports in 1948-49 than the small exports for the current year.

## REVISED ESTIMATES OF THE SUPPLY AND DISTRIBUTION OF MEATS IN 1941-1947

A review of the supply and distribution of meats since 1941 has been in progress for some time. It had not been possible to reconcile on a current basis the procurement information of the War Meat Board, the Department of Agriculture data on shipments of meats, the Department of Commerce foreign trade data, and information on inter-departmental transfers of meats. Despite many difficulties with the classification and timing of the several reports, it was finally possible to balance the procurement data and the delivery data from the various sources for the war period. The study has been made on a quarterly basis and a complete report with detailed data will soon be available. Meanwhile the revised data on the supply and distribution of meats on an annual basis are given in table 5. The table also includes revisions for the years 1933-36, which reflect improved slaughter data on the special Government slaughter programs in those years.

Most of the revisions in the civilian consumption data developing from the study were relatively minor with the exception of the estimates for 1943. Analysis of the procurement and delivery data indicated serious deficiences in the U. S. Department of Agriculture stock data prior to 1944. Before that time information on stocks held was calculated from fiscal accounting records. In 1944 a physical inventory was taken. The balancing of purchases and deliveries indicated that the January 1943 stocks were particularly in error. Civilian meat consumption per capita in 1943 is now estimated at 146 pounds, about 7 pounds more than the previous estimate. 1/ The higher estimate reflects more completely the heavy consumption of meats in the latter part of the year.

As a corollary of this study of the supply and distribution of all meats, an analysis has been made of the production and distribution of federally inspected canned meats (excluding only small quantities of canned meats produced in non-federally inspected plants). Table 6 summarizes this analysis which was published in the March 1948 issue of The Livestock and Meat Situation, pages 12 and 13.

## THE USE OF NONFAT DRY MILK SOLIDS IN SCHOOL LUNCH PROGRAMS 2/

In 1945-46 at least 40 percent of the school lunches served in several Southern States included no milk as a beverage. The principal reason was the non-availability of milk of acceptable quality. Riboflavin and calcium are particularly important in the diets of growing children and the most important source of these nutrients is milk. Therefore, a study was conducted in 1946 in 8 states to determine the acceptability of reconstituted nonfat dry milk solids as a beverage.

1/ The index of civilian per capita consumption for 1943 has been revised upward to 109 on the basis of this change in meat consumption. See table 1.

2/ Prepared in cooperation with the Food Distribution Programs Branch, Production and Marketing Administration.

Table 5.--Meats (dressed weight), supply and distribution, calendar years, 1933-47

| Year | Supply: Pro-duction | Supply: Begin-ning com'l stocks | Supply: Imports | Supply: Total supply | Distribution: Ending com'l stocks | Distribution: Com'l ex-ports and ship-ments | Dept. of Agriculture: Begin-ning stocks | Dept. of Agriculture: Ending stocks | Dept. of Agriculture: Deliv-eries | Dept. of Agriculture: Net pur-chases for export | Domestic disappearance: Military | Domestic disappearance: Civilian | Civilian per capita |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Lb. |
| **A. Beef** | | | | | | | | | | | | | |
| 1933 | 7,440 | 43 | 104 | 6,587 | 79 | 39 | 0 | 0 | | 279 | | 6,469 | 51.2 |
| 1934 | 2/8,345 | 79 | 118 | 8,542 | 141 | 55 | 0 | 279 | | 22 | | 8,065 | 63.5 |
| 1935 | 2/8,508 | 141 | 201 | 5,950 | 105 | 53 | 279 | 301 | | -301 | | 7,742 | 60.1 |
| 1936 | 2/7,368 | 106 | 226 | 7,689 | 194 | 54 | 301 | 0 | | | | 7,107 | 54.8 |
| 1937 | 5,798 | 194 | 227 | 7,219 | 51 | 51 | | | | | | 7,068 | 54.0 |
| 1938 | 5,908 | 51 | 200 | 7,159 | 58 | 53 | | | | | | 7,159 | 54.4 |
| 1939 | 7,011 | 58 | 219 | 7,288 | 77 | 52 | | | | | | 7,167 | 55.2 |
| Average 1935-39 | 2/8,937 | 112 | 214 | 7,253 | 99 | 53 | 116 | 60 | | -58 | | 7,254 | 54.7 |
| 1940 | 7,182 | 77 | 168 | 7,427 | 107 | 56 | | | | | | 7,164 | 54.1 |
| 1941 | 8,082 | 107 | 257 | 8,446 | 135 | 51 | | 1 | 1 | 2 | 236 | 8,022 | 60.5 |
| 1942 | 8,843 | 135 | 211 | 9,189 | 127 | 30 | 1 | 18 | 24 | 39 | 944 | 8,049 | 60.9 |
| 1943 | 8,571 | 127 | 225 | 8,923 | 227 | 26 | 16 | 93 | 64 | 141 | 1,869 | 6,860 | 53.0 |
| 1944 | 9,112 | 227 | 189 | 9,528 | 89 | 37 | 93 | 77 | 55 | 49 | 2,207 | 7,148 | 55.3 |
| 1945 | 10,275 | 89 | 127 | 10,491 | 3/268 | 34 | 77 | 242 | 4/294 | 459 | 2,078 | 7,884 | 59.1 |
| 1946 | 9,373 | 3/258 | 20 | 9,651 | 151 | 35 | 242 | 3 | 4/628 | 387 | 644 | 8,534 | 61.4 |
| 1947 | 10,429 | 151 | 64 | 10,644 | 169 | 175 | 3 | | 3 | | 386 | 9,914 | 69.2 |
| **B. Veal** | | | | | | | | | | | | | |
| 1933 | 891 | 0 | 5/ | 891 | | | | | | | | 891 | 7.1 |
| 1934 | 2/1,248 | 0 | | 1,248 | | | 0 | 64 | | 64 | | 1,182 | 9.3 |
| 1935 | 2/1,023 | 0 | 5/ | 1,023 | | | 84 | 0 | | -54 | | 1,087 | 8.5 |
| 1936 | 2/1,075 | 0 | 5/ | 1,075 | | | | | | | | 1,075 | 8.3 |
| 1937 | 1,108 | | | 1,108 | | | | | | | | 1,108 | 8.8 |
| 1938 | 994 | | | 994 | | | | | | | | 994 | 7.6 |
| 1939 | 991 | 1 | | 992 | | | | | | | | 992 | 7.5 |
| Average 1935-39 | 2/1,038 | | | 1,038 | | | 13 | | | -13 | | 1,051 | 8.1 |
| 1940 | 981 | | | 981 | | | | | | | | 981 | 7.4 |
| 1941 | 1,036 | | 5/ | 1,036 | | 5 | | | | | 25 | 1,006 | 7.6 |
| 1942 | 1,151 | | 1 | 1,152 | | 3 | | | 5/ | 5/ | 65 | 1,084 | 8.2 |
| 1943 | 1,157 | | 1 | 1,168 | | 3 | 0 | 9 | 16 | 26 | 81 | 1,059 | 8.2 |
| 1944 | 1,738 | | 1 | 1,739 | 8 | 3 | 9 | 6 | 28 | 23 | 111 | 1,594 | 12.3 |
| 1945 | 1,551 | 8 | 1 | 1,870 | 9 | 3 | 5 | 11 | 7 | 12 | 113 | 1,533 | 11.8 |
| 1946 | 1,440 | 9 | 1 | 1,450 | 12 | 3 | 11 | 5/ | 19 | 8 | 49 | 1,376 | 9.9 |
| 1947 | 1,599 | 12 | 5/ | 1,611 | 20 | 17 | 5/ | | 5/ | | 34 | 1,540 | 10.7 |
| **C. Beef and veal** | | | | | | | | | | | | | |
| 1933 | 7,331 | 43 | 104 | 7,478 | 79 | 39 | | | | | | 7,360 | 58.3 |
| 1934 | 2/9,591 | 79 | 118 | 9,788 | 141 | 55 | | 343 | | 343 | | 9,248 | 72.8 |
| 1935 | 2/7,631 | 141 | 201 | 7,973 | 106 | 53 | 343 | 301 | | -42 | | 7,868 | 61.4 |
| 1936 | 2/8,433 | 106 | 226 | 8,784 | 194 | 54 | 301 | 0 | | -301 | | 8,817 | 68.4 |
| 1937 | 7,906 | 194 | 227 | 8,327 | 61 | 51 | | | | | | 8,215 | 63.4 |
| 1938 | 7,902 | 81 | 200 | 8,163 | 58 | 53 | | | | | | 8,052 | 61.6 |
| 1939 | 8,002 | 58 | 220 | 8,280 | 77 | 52 | | | | | | 8,151 | 61.9 |
| Average 1935-39 | 2/7,975 | 112 | 214 | 8,361 | 99 | 53 | 129 | 50 | | -69 | | 8,218 | 63.3 |
| 1940 | 8,153 | 77 | 168 | 8,408 | 107 | 56 | | | | | | 8,245 | 62.1 |
| 1941 | 9,118 | 107 | 257 | 9,482 | 135 | 55 | 0 | 1 | 1 | 2 | 281 | 9,028 | 68.1 |
| 1942 | 9,994 | 135 | 212 | 10,341 | 127 | 33 | 1 | 18 | 24 | 39 | 1,009 | 9,133 | 69.1 |
| 1943 | 9,738 | 127 | 225 | 10,091 | 227 | 29 | 16 | 102 | 80 | 186 | 1,750 | 7,919 | 61.2 |
| 1944 | 10,850 | 227 | 190 | 11,267 | 97 | 40 | 102 | 83 | 91 | 72 | 2,318 | 8,740 | 67.6 |
| 1945 | 11,936 | 97 | 128 | 12,161 | 3/257 | 37 | 83 | 253 | 4/301 | 471 | 2,189 | 9,197 | 70.9 |
| 1946 | 10,813 | 3/257 | 21 | 11,101 | 163 | 38 | 253 | 3 | 4/646 | 395 | 593 | 9,912 | 71.3 |
| 1947 | 12,028 | 163 | 64 | 12,255 | 189 | 192 | 3 | | 3 | | 420 | 11,454 | 79.9 |

1/ Net procurement. After 1941 transfers of beef and pork to USDA have been taken out; 1942-1944 as reported; 1945 and 1946 transfers adjusted to procurement periods.
2/ Includes the following slaughter under Emergency Drought Program: Beef: 1,279 million lbs. in 1934, 60 million in 1935 and 1 million in 1936; Veal: 181 million lbs. in 1934, 8 million in 1935; Lamb and mutton: 51 million lbs. in 1934, Pork includes 100 million lbs. slaughter under 1933 sow and pig purchase program in 1933 and 53 million lbs. under supplemental hog purchase program in 1933 and 169 million in 1934.

| Year | Supply: Pro-duction | Supply: Begin-ning com'l stocks | Supply: Imports | Supply: Total supply | Distribution: Ending com'l stocks | Distribution: Com'l ex-ports and ship-ments | Dept. of Agriculture: Begin-ning stocks | Dept. of Agriculture: Ending stocks | Dept. of Agriculture: Deliv-eries | Dept. of Agriculture: Net pur-chases for export | Domestic disappearance: Military | Domestic disappearance: Civilian | Civilian per capita |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Lb. |
| **D. Lamb and mutton** | | | | | | | | | | | | | |
| 1933 | 855 | 3 | | 855 | 4 | 2 | | | | | | 849 | 6.7 |
| 1934 | 2/ 851 | 4 | | 855 | 5 | 2 | | 50 | | 50 | | 798 | 6.3 |
| 1935 | 877 | 5 | | 882 | 3 | 2 | 50 | 4 | | -46 | | 923 | 7.2 |
| 1936 | 854 | 3 | | 857 | 10 | 2 | 4 | 0 | | - 4 | | 849 | 6.6 |
| 1937 | 852 | 11 | | 863 | 3 | 2 | | | | | | 858 | 6.8 |
| 1938 | 897 | 3 | | 900 | 4 | 2 | | | | | | 894 | 6.8 |
| 1939 | 872 | 4 | | 876 | 5 | 3 | | | | | | 868 | 6.6 |
| Average 1935-39 | 870 | 6 | | 875 | 5 | 2 | 11 | 1 | | -10 | | 878 | 6.9 |
| 1940 | 876 | 5 | | 881 | 5 | 3 | | | | | | 873 | 6.6 |
| 1941 | 923 | 5 | 5/ | 928 | 8 | 8 | | | | | 13 | 901 | 8.8 |
| 1942 | 1,042 | 8 | 5/ | 1,050 | 21 | 4 | | 19 | 8 | 27 | 49 | 949 | 7.2 |
| 1943 | 1,104 | 21 | 1 | 1,125 | 33 | 3 | 19 | 21 | 128 | 128 | 132 | 830 | 8.4 |
| 1944 | 1,024 | 33 | 5/ | 1,057 | 20 | 3 | 21 | 12 | 58 | 59 | 118 | 857 | 5.8 |
| 1945 | 1,054 | 20 | 5/ | 1,074 | 18 | 4 | 12 | 8 | 24 | 18 | 93 | 943 | 7.3 |
| 1946 | 970 | 16 | 5/ | 985 | 16 | 4 | 8 | 0 | 17 | 11 | 30 | 925 | 5.7 |
| 1947 | 802 | 15 | 5/ | 818 | 19 | 12 | | | | | 22 | 765 | 5.3 |
| **E. Pork (Excluding lard)** | | | | | | | | | | | | | |
| 1933 | 2/9,234 | 491 | 3 | 9,728 | 630 | 202 | | 11 | | 11 | | 8,885 | 70.3 |
| 1934 | 2/8,397 | 830 | 2 | 9,029 | 588 | 211 | 11 | 0 | | -11 | | 8,141 | 64.0 |
| 1935 | 5,919 | 688 | 11 | 5,818 | 327 | 135 | | | | | | 5,155 | 48.1 |
| 1936 | 7,474 | 327 | 45 | 7,845 | 567 | 118 | | | | | | 7,081 | 54.8 |
| 1937 | 6,951 | 567 | 80 | 7,598 | 399 | 114 | | | | | | 7,185 | 55.4 |
| 1938 | 7,580 | 399 | 57 | 8,135 | 430 | 162 | | | | | | 7,554 | 57.8 |
| 1939 | 8,580 | 430 | 45 | 9,135 | 469 | 192 | | | | | | 8,474 | 64.3 |
| Average 1935-39 | 7,337 | 502 | 48 | 7,887 | 458 | 143 | | | | | | 7,288 | 58.1 |
| 1940 | 10,044 | 469 | 7 | 10,520 | 655 | 163 | | | | | | 9,701 | 73.0 |
| 1941 | 9,528 | 855 | 12 | 10,198 | 459 | 111 | | 74 | 372 | 446 | 173 | 9,007 | 68.0 |
| 1942 | 10,876 | 459 | 2 | 11,337 | 488 | 86 | 74 | 450 | 1,134 | 1,510 | 904 | 8,359 | 63.3 |
| 1943 | 13,540 | 488 | 8 | 14,135 | 503 | 38 | 450 | 457 | 2,075 | 2,092 | 1,331 | 10,172 | 78.5 |
| 1944 | 13,304 | 503 | 5/ | 13,807 | 316 | 54 | 457 | 171 | 1,550 | 1,384 | 1,843 | 10,230 | 79.3 |
| 1945 | 10,897 | 316 | 2 | 11,015 | 5/385 | 34 | 171 | 63 | 7/839 | 731 | 1,287 | 8,598 | 66.3 |
| 1946 | 11,173 | 6/366 | 1 | 11,539 | 272 | 71 | 63 | 25 | 7/405 | 367 | 295 | 10,530 | 75.7 |
| 1947 | 10,605 | 272 | 5/ | 10,877 | 518 | 107 | 25 | | 25 | | 229 | 10,023 | 70.0 |
| **F. Total meats** | | | | | | | | | | | | | |
| 1933 | 2/17,417 | 537 | 107 | 18,061 | 713 | 243 | | 11 | | 11 | | 17,094 | 135.3 |
| 1934 | 2/18,839 | 713 | 120 | 19,672 | 834 | 269 | 11 | 393 | | 382 | | 18,187 | 143.1 |
| 1935 | 2/14,427 | 834 | 212 | 15,473 | 435 | 191 | 393 | 305 | | -88 | | 14,934 | 118.7 |
| 1936 | 2/16,781 | 438 | 270 | 17,487 | 871 | 174 | 305 | 0 | | -305 | | 16,727 | 129.8 |
| 1937 | 15,709 | 872 | 307 | 16,888 | 463 | 187 | | | | | | 16,258 | 125.4 |
| 1938 | 16,479 | 463 | 257 | 17,199 | 492 | 207 | | | | | | 16,500 | 126.2 |
| 1939 | 17,534 | 492 | 264 | 18,290 | 551 | 246 | | | | | | 17,493 | 132.8 |
| Average 1935-39 | 2/16,182 | 619 | 262 | 17,063 | 562 | 198 | 140 | 51 | | -79 | | 16,382 | 126.2 |
| 1940 | 19,083 | 551 | 175 | 19,809 | 758 | 222 | | | | | | 18,819 | 141.7 |
| 1941 | 19,589 | 758 | 259 | 20,606 | 502 | 173 | | 75 | 373 | 448 | 447 | 18,938 | 142.9 |
| 1942 | 21,912 | 602 | 214 | 22,728 | 538 | 103 | 75 | 485 | 1,168 | 1,576 | 1,982 | 18,451 | 139.6 |
| 1943 | 24,482 | 635 | 235 | 25,353 | 703 | 70 | 485 | 590 | 2,281 | 2,385 | 3,213 | 18,921 | 145.1 |
| 1944 | 25,178 | 753 | 190 | 26,131 | 433 | 97 | 590 | 266 | 1,819 | 1,495 | 4,279 | 19,827 | 153.5 |
| 1945 | 23,687 | 433 | 130 | 24,260 | 3/648 | 75 | 266 | 322 | 8/1,164 | 1,220 | 3,569 | 18,738 | 144.5 |
| 1946 | 22,958 | 3/648 | 22 | 23,625 | 451 | 117 | 322 | 28 | 8/1,057 | 773 | 918 | 21,387 | 163.7 |
| 1947 | 23,435 | 451 | 64 | 23,950 | 726 | 311 | 28 | | 28 | | 671 | 22,242 | 165.2 |

3/ Includes 114 million lbs. beef procured by Army in 1945 and transferred to USDA and UNRRA in 1945 and 1946.
4/ Includes beef transferred by Military agencies to UNRRA; 1945-187 million lbs.; 1946-73 million lbs.
5/ Less than 500 thousand lbs.
6/ Includes 55 million lbs. pork procured by Army in 1945 and transferred to USDA and UNRRA in 1945 and 1946.
7/ Includes pork transferred by Military agencies to UNRRA; 1946-118 million lbs.; 1945-35 million lbs.
8/ Includes beef and pork transferred by Military agencies to UNRRA. See footnotes 4/ and 7/.

Table 6.-Canned meat: Production and distribution, 1937-47

(net product weight)

| Year | Federally inspected production 1/ | Imports 2/ | Total supply | Commercial exports and shipments 3/ | U.S.D.A. purchases 4/ | Military purchases 5/ | Apparent civilian distribution 6/ |
|---|---|---|---|---|---|---|---|
| | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. |
| 1937 | 308.1 | 88.1 | 396.2 | 21.9 | 0 | --- | 374.3 |
| 1938 | 303.5 | 78.6 | 382.1 | 22.8 | 0 | --- | 359.3 |
| 1939 | 406.8 | 85.9 | 492.7 | 23.9 | 0 | --- | 468.8 |
| 1940 | 530.2 | 61.3 | 591.5 | 20.2 | 0 | --- | 571.3 |
| 1941 | 883.9 | 104.3 | 988.2 | 26.7 | 188.4 | 75.5 | 697.6 |
| 1942 | 1,926.6 | 91.6 | 2,018.2 | 19.8 | 875.6 | 920.5 | 202.3 |
| 1943 | 2,051.2 | 105.5 | 2,156.7 | 9.9 | 1,024.8 | 680.5 | 441.5 |
| 1944 | 1,930.7 | 87.7 | 2,018.4 | 13.2 | 448.6 | 1,121.0 | 435.6 |
| 1945 | 1,926.1 | 54.8 | 1,980.9 | 13.5 | 359.6 | 970.9 | 636.9 |
| 1946 | 1,342.8 | 3.3 | 1,346.1 | 55.3 | 157.1 | 19.2 | 1,114.5 |
| 1947 | 1,099.4 | 28.7 | 1,128.1 | 64.2 | --- | 7/ 31.2 | 1,032.7 |

1/ Beef, pork, sausage, all other, excluding soup; Federally inspected production is a very large part of total production. 2/ Includes canned beef only. 3/ Department of Commerce data; for 1941-46 the figures are total exports and shipments minus lend-lease and UNRRA. 4/ Canned meats and meat food products officially graded for CCC. Does not include transfers of meat from the military to CCC or small quantities turned back to civilians, or transferred to the military. Purchases from U. S. supplies or imports. 5/ From "Statistical Yearbooks of the Quartermaster Corps" and other military records; War Meat Board and other Department of Agriculture figures. The items shown are not a complete listing of all canned meats purchased during the war years, but cover practically all of the canned meats purchased during the war for mass troop feeding. Includes imported canned meat and army rations. Includes some meat and rations later transferred to CCC and UNRRA. Purchases from U. S. supplies or imports. 6/ From federally inspected supplies and imports. 7/ Preliminary.

The Department of Agriculture purchased and made available supplies of nonfat dry milk solids to selected schools in 8 Southern States. To test the acceptance of the product, 185,415 meals were served which included a half pint of reconstituted nonfat dry milk. In only 4 percent of the cases were one-half glass or more of milk not consumed. The acceptance ran even higher where children had little fresh milk at home. Experiments in the use of nonfat dry milk solids in cooking also proved highly successful. During the fiscal year 1946-47, a total of 786,000 pounds of nonfat dry milk solids were used in the school lunch programs in 24 states, Puerto Rico and the Virgin Islands. The program has been considerably expanded in this school year. Such use in 1947-48 is expected to exceed 7 million pounds. Although a substantial quantity, this represents less than one percent of U. S. production of nonfat dry milk solids.

The use of nonfat dry milk solids as a beverage in school lunch programs is limited to those schools that do not have access to a sufficient supply of acceptable fresh whole milk. Certification that such a supply is not available must be secured by the school officials from appropriate agricultural authorities within the area, such as the county agent or a State Department of Agriculture representative. This is done to prevent the use of nonfat dry milk solids when fluid whole milk is available to the school. All participating schools are eligible to receive nonfat dry milk solids for cooking purposes. However, they must agree not to reduce their purchases of fresh milk because of any quantities of nonfat dry milk solids that are made available to them.

Nonfat dry milk, rather than dry whole milk, has been used for the following reasons: (1) The nutritive value of the two types of milk are the same except for the absence of fat and vitamin A in the skimmed product; (2) the supply of nonfat dry milk solids is much more plentiful since its production is 4 times as large as that of dry whole milk; (3) nonfat dry milk solids were purchased in 1947 at the cost of 16 cents per pound whereas the price of dry whole milk averaged 41 cents; (4) the keeping quality of nonfat dry milk solids is better than that of dry whole milk, a particularly important consideration in schools where refrigerated storage facilities are limited.

This program is being carried on under the authority of Section 6 of the National School Lunch Act, Public Law 396, passed by the 79th Congress. Under the Act, the Secretary of Agriculture may reserve a portion of the funds made available for the direct purchase and distribution of foods to participating schools. Foods purchased under Section 6 are those that will make an important addition to the value of the lunches served and are distributed on the basis of need as determined by local school authorities.

Table 7.-Planted acreage of major crops, 1935-39 average, 1947, goals for 1948 and prospective plantings for 1948, with percentage comparisons

| Crop | Planted acreage | | 1948 goals | Prospective plantings 1948 1/ | Prospective 1948 as percentage of | | |
|---|---|---|---|---|---|---|---|
| | 1935-39 | 1947 | | | 1935-39 | 1947 | 1948 goal |
| | 1,000 acres | 1,000 acres | 1,000 acres | 1,000 acres | Percent | Percent | Percent |
| Total 2/ | 323,514 | 333,818 | | 336,647 | 104 | 101 | -- |
| Corn, all | 97,044 | 86,168 | 90,700 | 86,131 | 89 | 100 | 95 |
| Wheat, all | 73,236 | 77,947 | 75,095 | 78,437 | 107 | 101 | 104 |
| Winter | 51,577 | 58,068 | -- | 58,648 | 114 | 101 | -- |
| Spring, all | 21,659 | 19,879 | -- | 19,789 | 91 | 100 | -- |
| Oats | 40,591 | 42,501 | 43,940 | 45,709 | 113 | 108 | 104 |
| Barley | 13,365 | 12,030 | 12,625 | 12,660 | 95 | 105 | 100 |
| Flaxseed | 1,938 | 4,157 | 4,326 | 4,401 | 227 | 106 | 102 |
| Rice | 1,007 | 1,687 | 1,660 | 1,666 | 165 | 99 | 100 |
| All sorghums | 15,254 | 11,700 | -- | 12,983 | 85 | 111 | -- |
| Sorghums, all excl. sirups | 15,029 | 11,538 | 14,938 | 12,821 | 85 | 111 | 86 |
| Potatoes | 3,123 | 2,147 | 2,352 | 2,162 | 69 | 101 | 92 |
| Sweetpotatoes | 804 | 618 | 618 | 560 | 70 | 91 | 91 |
| Tobacco 3/ | 1,647 | 1,875 | *1,632 | 1,528 | 93 | 81 | 94 |
| Beans, dry, edible | 1,917 | 1,839 | 2,169 | 1,811 | 94 | 98 | 83 |
| Peas, dry field | 281 | 551 | 517 | 470 | 167 | 85 | 91 |
| Soybeans for beans 3/ | 3,042 | 11,125 | 10,546 4/ | 9,911 | 326 | 89 | 94 |
| Soybeans, grown alone 5/ | 7,262 | 12,894 | -- | 11,659 | 161 | 90 | -- |
| Cowpeas, grown alone 5/ | 3,165 | 1,143 | -- | 1,039 | 33 | 91 | -- |
| Peanuts, picked and threshed 3/ | 1,659 | 3,378 | 2,839 6/ | 3,263 | 197 | 97 | 115 |
| Peanuts, grown alone 5/ | 2,173 | 4,156 | -- | 3,988 | 184 | 96 | -- |
| Hay, all 3/ | 67,940 | 75,291 | 75,413 | 74,215 | 109 | 99 | 98 |
| Sugar beets | 891 | 966 | 7/ -- | 902 | 109 | 93 | -- |

1/ From March 1948 Prospective Plantings Report and December 18, 1947 Winter Wheat and Rye Report.
2/ Includes all wheat, soybeans for beans, peanuts picked and threshed, and sorghums all, excluding sirup.
3/ Harvested acreage.
4/ 1948 indicated solid equivalent acreage adjusted for the percentage harvested for beans by using the 1946-47 average percentages, by States.
5/ For all purposes.
6/ Assuming the usual relationship of acreages planted alone to acreages for picking and threshing, by States.
7/ Sugar Act of 1948 applicable.
*Includes 1,485,000 approximated acres from announced marketing quotas. Flue-cured (909,000), Fire-cured (78,000), Burley (465,000), Dark Air-cured (33,000).

Table 8. Prospective and actual acreages planted in major crops, 1945-47 with percentage comparisons 1/

| Crop | 1945 | | | 1946 | | | 1947 | | |
|---|---|---|---|---|---|---|---|---|---|
| | Prospective | Actual | As percentage of prospective | Prospective | Actual | As percentage of prospective | Prospective | Actual | As percentage of prospective |
| | 1,000 acres | 1,000 acres | Percent | 1,000 acres | 1,000 acres | Percent | 1,000 acres | 1,000 acres | Percent |
| Total | 296,827 | 291,012 | 98 | 288,969 | 285,559 | 99 | 284,295 | 279,602 | 98 |
| Corn, all | 95,778 | 89,727 | 94 | 92,993 | 89,788 | 97 | 87,599 | 86,168 | 98 |
| Spring wheat | 19,008 | 18,715 | 98 | 18,961 | 19,341 | 102 | 19,280 | 19,879 | 103 |
| Oats | 46,555 | 45,889 | 99 | 46,444 | 46,549 | 100 | 46,620 | 42,501 | 91 |
| Barley | 12,285 | 11,718 | 95 | 11,521 | 11,527 | 100 | 11,714 | 12,030 | 103 |
| Flaxseed | 4,175 | 3,953 | 95 | 3,497 | 2,641 | 76 | 4,488 | 4,157 | 93 |
| Rice | 1,507 | 1,507 | 100 | 1,575 | 1,586 | 101 | 1,619 | 1,687 | 104 |
| All sorghums | 16,285 | 15,912 | 98 | 14,787 | 14,749 | 100 | 13,109 | 11,700 | 89 |
| Potatoes | 2,893 | 2,766 | 96 | 2,738 | 2,645 | 97 | 2,310 | 2,147 | 93 |
| Sweetpotatoes | 715 | 677 | 95 | 712 | 682 | 96 | 664 | 618 | 93 |
| Tobacco 2/ | 1,782 | 1,822 | 102 | 1,954 | 1,962 | 100 | 1,908 | 1,875 | 98 |
| Beans, dry edible | 1,971 | 1,656 | 84 | 1,673 | 1,697 | 101 | 1,889 | 1,839 | 97 |
| Peas, dry field | 427 | 549 | 129 | 462 | 521 | 113 | 589 | 551 | 94 |
| Soybeans 3/ | 13,236 | 13,007 | 98 | 11,840 | 11,662 | 98 | 12,213 | 12,894 | 106 |
| Cowpeas 3/ | 1,500 | 1,477 | 98 | 1,468 | 1,215 | 83 | 1,116 | 1,143 | 102 |
| Peanuts 3/ | 3,923 | 3,844 | 98 | 3,759 | 3,917 | 104 | 3,847 | 4,156 | 108 |
| All Hay 2/ | 4/74,019 | 77,017 | 104 | 4/73,652 | 74,173 | 101 | 4/74,337 | 75,291 | 101 |
| Sugar Beets | 768 | 776 | 101 | 933 | 904 | 97 | 993 | 966 | 97 |

1/ Based on the prospective planted acreages indicated by farmers' reported March 1 intentions.
2/ Acreage harvested.
3/ Grown alone for all purposes. Partly duplicated in hay acreage.
4/ Includes wild hay harvested in 22 Western States, to be comparable with actual acreage data.

Table 9.-Production of major food commodities, calendar years, 1935-39 average, 1945, 1946, 1947 and preliminary indications for 1948 with percentage comparison 1/

| Commodity | Unit | Average 1935-39 | 1945 | 1946 | 1947 | Preliminary indications for 1948 | 1948 as a percentage of 1935-39 | 1948 as a percentage of 1947 |
|---|---|---|---|---|---|---|---|---|
| Meats (dr. wt.) | | | | | | | | |
| Beef | Mil. lb. | 6,937 | 10,275 | 9,373 | 10,429 | 9,300 | 134 | 89 |
| Veal | " " | 1,038 | 1,661 | 1,440 | 1,599 | 1,500 | 145 | 94 |
| Lamb and mutton | " " | 870 | 1,054 | 970 | 802 | 700 | 80 | 87 |
| Pork (excluding lard) | " " | 7,337 | 10,697 | 11,173 | 10,605 | 9,600 | 131 | 91 |
| Total meats | " " | 16,182 | 23,687 | 22,956 | 23,435 | 21,100 | 130 | 90 |
| Poultry and eggs | | | | | | | | |
| Eggs | Mil. doz. | 3,335 | 5,120 | 5,098 | 5,069 | 4,900 | 147 | 97 |
| Chicken (dr. wt.) | Mil. lb. | 2,327 | 4,170 | 3,597 | 3,458 | 3,300 | 142 | 95 |
| Turkey (dr. wt.) | " " | 350 | 673 | 665 | 608 | 460 | 131 | 76 |
| Dairy products | | | | | | | | |
| Total milk 2/ | " " | 103,656 | 120,995 | 119,285 | 118,892 | 117,026 | 113 | 98 |
| Cheese 3/ | " " | 669 | 1,117 | 1,099 | 1,207 | 1,155 | 173 | 96 |
| Cond. and evap. milk | " " | 2,225 | 4,124 | 3,335 | 3,508 | 3,480 | 156 | 99 |
| Fluid milk and cream 4/ | " " | 44,146 | 57,671 | 59,910 | 56,926 | 56,811 | 129 | 100 |
| Fats and oils | | | | | | | | |
| Butter, farm & factory (actual weight) | " " | 2,170 | 1,701 | 1,501 | 1,637 | 1,585 | 73 | 97 |
| Lard 5/ | " " | 1,624 | 2,010 | 2,114 | 2,316 | 2,150 | 132 | 93 |
| Margarine (fat content) | " " | 303 | 499 | 465 | 606 | 650 | 215 | 107 |
| Shortening | " " | 1,529 | 1,441 | 1,451 | 1,376) | | | |
| Other edible fats and oils 6/ | " " | 575 | 966 | 683 | 1,075) | 2,390 | 114 | 98 |
| Total fats and oils 7/ | " " | 6,201 | 6,617 | 6,214 | 7,010 | 6,775 | 109 | 97 |
| Fruits | | | | | | | | |
| Fresh: | | | | | | | | |
| Citrus | " " | 6,870 | 9,931 | 9,296 | 9,992 | 9,400 | 137 | 94 |
| Apples (commercial) | " " | 4,384 | 2,415 | 3,936 | 3,900) | 9,050 | 98 | 96 |
| Other (excl. melons) | " " | 4,847 | 5,308 | 5,574 | 5,565) | | | |
| Processed: | | | | | | | | |
| Canned fruit | " " | 1,705 | 1,905 | 3,083 | 2,588 | 2,700 | 158 | 104 |
| Canned fruit juices | " " | 345 | 1,804 | 2,292 | 2,016 | 2,373 | 688 | 118 |
| Frozen | " " | 106 | 447 | 523 | 347 | 400 | 377 | 115 |
| Dried | " " | 1,111 | 1,015 | 1,014 | 1,195 | 8/ | - | - |

- Continued

Table 9.-Production of major food commodities, calendar years, 1935-39 average, 1945, 1946, 1947 and preliminary indications for 1948 with percentage comparison 1/ - Continued

| Commodity | Unit | Average 1935-39 | 1945 | 1946 | 1947 | Preliminary indications for 1948 | 1948 as a percentage of 1935-39 | 1948 as a percentage of 1947 |
|---|---|---|---|---|---|---|---|---|
| Vegetables | | | | | | | | |
| Fresh 9/ | Mil.lb. | 30,520 | 35,607 | 38,946 | 35,675 | 37,500 | 123 | 105 |
| Canned 10/ | " " | 4,084 | 6,551 | 7,637 | 6,019 | 6,000 | 147 | 100 |
| Frozen | " " | 11/ 78 | 308 | 450 | 345 | 415 | 532 | 120 |
| Potatoes | Mil.bu. | 356 | 419 | 484 | 384 | 390 | 110 | 102 |
| Sweetpotatoes | " " | 68 | 65 | 66 | 57 | 54 | 79 | 95 |
| Dry edible beans 12/ | Mil.lbs. | 1,360 | 1,195 | 1,474 | 1,599 | 1,550 | 114 | 97 |
| Canned baby foods | " " | 48 | 422 | 462 | 353 | 450 | 938 | 127 |
| Sugar, raw basis | 1,000 sh.tons | 1,948 | 1,667 | 1,900 | 2,159 | 2,200 | 113 | 102 |
| Grains | | | | | | | | |
| Wheat | Mil.bu. | 759 | 1,108 | 1,153 | 1,365 | 1,117 | 147 | 82 |
| Rye | Mil.bu. | 44.9 | 24.0 | 18.9 | 26.0 | 26.0 | 58 | 100 |
| Rice, milled | Mil.lbs. | 1,340 | 2,045 | 2,044 | 2,207 | 2,405 | 179 | 109 |
| Corn, grain only | Mil.bu. | 2,050 | 2,594 | 2,990 | 2,153 | 2,700 | 132 | 125 |
| Oats | " " | 1,045 | 1,536 | 1,498 | 1,216 | 1,370 | 131 | 113 |
| Barley | " " | 239 | 267 | 262 | 279 | 284 | 119 | 102 |
| Peanuts | Mil.lb. | 1,229 | 2,042 | 2,038 | 2,252 | 8/ | - | - |

1/ Calendar year basis except for fresh citrus fruit for which the season begins in the fall of the previous year; dried fruits which are on a pack-year basis; rice on a marketing year. 2/ The production of total milk for human consumption given here differs from total farm production of milk in that the former excludes milk fed to calvesbut includes off-farm production while the latter excludes off-farm production but includes milk fed to calves. Milk fed calves and milk produced off farms are usually of approximately equal volume. 3/ Excluding full skim, cottage, pot, and bakers' cheese. 4/ Fluid milk equivalent for fresh use. 5/ Excluding amount used in manufactured products. 6/ Represents fats used in cooking and salad oils, salad dressing, mayonnaise, bakery products and other minor uses such as fish canning. 7/ Fat content basis except for butter which is on an actual weight basis. 8/ Not available. 9/ Estimates of all vegetables and melons other than potatoes and sweetpotatoes include reported commercial production for fresh market shipments plus rough estimates of quantities produced in market gardens for fresh sale and farm gardens for home use. Excludes town garden production. 10/ Includes asparagus, beans (lima), beans (snap), beets, carrots, corn, hominy, kraut (including bulk), peas, pickles (including bulk), pimientos, Irish potatoes, sweet potatoes, pumpkin and squash, tomatoes, tomato pulp, and tomato juice, tomato sauce, paste, and catsup and chili sauce, mixed vegetables. 11/ Average 1937-39. Data prior to 1937 are not available. 12/ Cleaned basis.

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Table 10.-Retail food prices and total consumer price index, United States 1940-46 and 1947-48 by months
(Index numbers 1935-39 = 100)

| Year and month | Meats 1/ | Eggs | Dairy products 2/ | Fats and oils 3/ | Cereals and bakery products | Fruit and vegetables: Fresh | Fruit and vegetables: Canned | Fruit and vegetables: Dried | Sugar and sweets | Beverages | All foods | Consumer price index |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1940 | 96 | 94 | 101 | 82 | 97 | 97 | 92 | 101 | 97 | 92 | 97 | 100 |
| 1941 | 108 | 112 | 112 | 94 | 98 | 104 | 98 | 107 | 106 | 102 | 106 | 105 |
| 1942 | 126 | 136 | 125 | 120 | 105 | 133 | 122 | 136 | 126 | 122 | 124 | 116 |
| 1943 | 134 | 162 | 135 | 126 | 108 | 178 | 131 | 159 | 127 | 125 | 138 | 124 |
| 1944 | 130 | 153 | 134 | 123 | 108 | 177 | 130 | 166 | 126 | 124 | 136 | 126 |
| 1945 | 131 | 164 | 134 | 124 | 109 | 188 | 130 | 168 | 126 | 125 | 139 | 128 |
| 1946 | 161 | 169 | 165 | 152 | 125 | 191 | 141 | 190 | 144 | 140 | 160 | 139 |
| 1947 | 217 | 201 | 186 | 198 | 155 | 201 | 166 | 263 | 180 | 187 | 194 | 159 |
| Jan. | 199 | 182 | 190 | 202 | 143 | 184 | 174 | 269 | 176 | 178 | 184 | 153 |
| Feb. | 197 | 170 | 183 | 201 | 144 | 189 | 173 | 270 | 178 | 183 | 182 | 153 |
| Mar. | 208 | 175 | 188 | 219 | 148 | 199 | 173 | 271 | 179 | 187 | 190 | 156 |
| Apr. | 203 | 176 | 179 | 228 | 153 | 201 | 173 | 270 | 179 | 190 | 188 | 156 |
| May | 204 | 179 | 172 | 200 | 154 | 210 | 172 | 268 | 179 | 189 | 188 | 156 |
| June | 217 | 183 | 172 | 188 | 155 | 208 | 170 | 263 | 180 | 181 | 190 | 157 |
| July | 220 | 203 | 179 | 182 | 155 | 204 | 168 | 264 | 180 | 181 | 193 | 158 |
| Aug. | 228 | 212 | 184 | 178 | 156 | 202 | 166 | 263 | 180 | 182 | 196 | 160 |
| Sept. | 241 | 236 | 195 | 177 | 158 | 202 | 157 | 261 | 181 | 187 | 204 | 164 |
| Oct. | 236 | 233 | 190 | 190 | 160 | 201 | 155 | 256 | 182 | 191 | 202 | 164 |
| Nov. | 227 | 225 | 198 | 196 | 168 | 205 | 156 | 252 | 183 | 195 | 203 | 165 |
| Dec. | 227 | 236 | 205 | 208 | 170 | 212 | 158 | 255 | 184 | 198 | 207 | 167 |
| 1948 | | | | | | | | | | | | |
| Jan. | 238 | 214 | 206 | 209 | 173 | 216 | 158 | 257 | 183 | 202 | 210 | 169 |
| Feb. | 225 | 189 | 204 | 194 | 172 | 220 | 158 | 256 | 177 | 204 | 205 | 168 |
| Mar. | 225 | 186 | 201 | 192 | 171 | 214 | 158 | 254 | 174 | 204 | 202 | 167 |

Index numbers from Bureau of Labor Statistics and rounded to the nearest whole number by Bureau of Agricultural Economics.
1/ Includes chicken and fish. 2/ Includes butter. 3/ Excludes butter.

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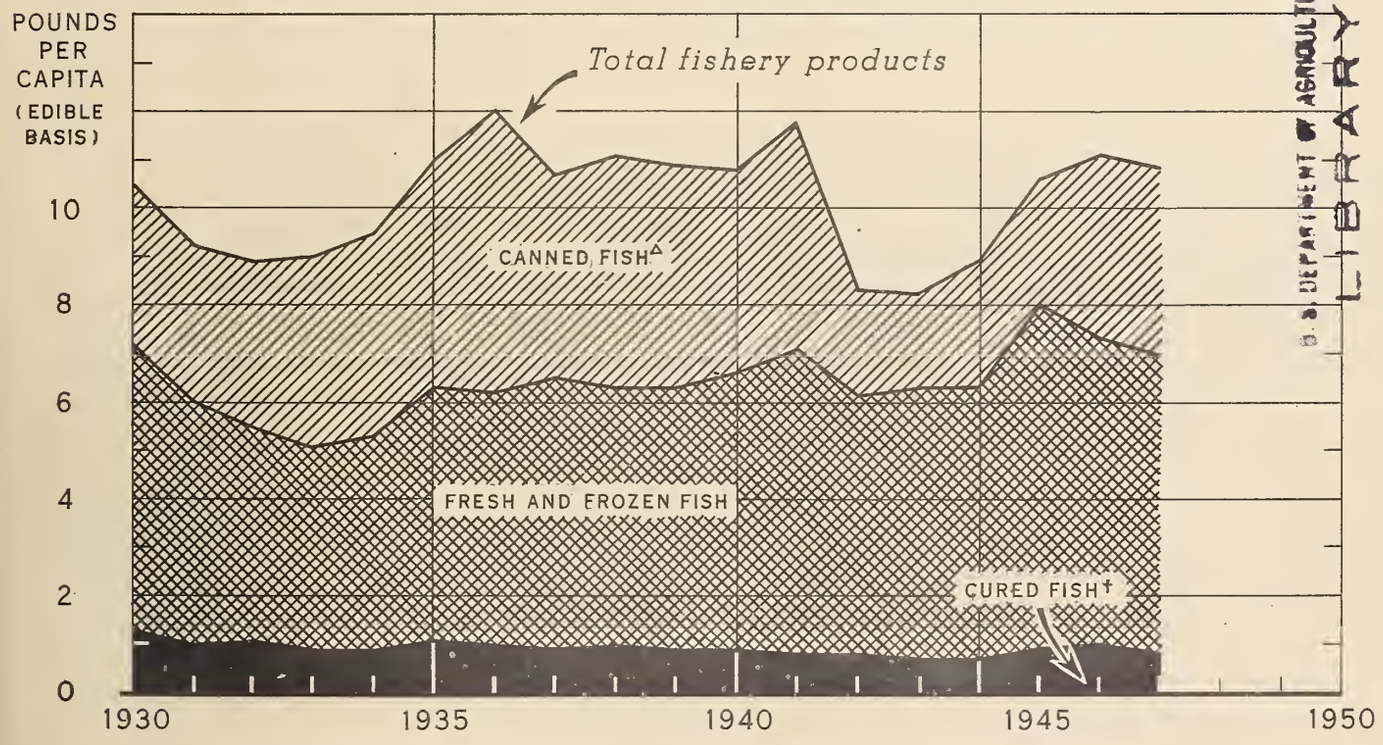
# THE National Food SITUATION

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

NFS-45 BAE JULY-SEPTEMBER 1948

In this issue:
A special article, "Supply and Distribution of Fishery Products in the Continental United States, 1930-47," begins on page 19.

## CIVILIAN PER CAPITA CONSUMPTION OF COMMERCIAL FISHERY PRODUCTS, UNITED STATES, 1930-47

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*△EXCLUDES CANNED FOOD PRODUCTS CONTAINING SMALL QUANTITIES OF FISH, FOR EXAMPLE, CLAM CHOWDER, CLAM BROTH AND CODFISH CAKE MATERIAL.*
*†EXCLUDES PARTIALLY PROCESSED PRODUCTS WHICH MAY SUBSEQUENTLY BE REPORTED AS A FINAL PRODUCT EITHER AS CANNED OR CURED FISH.*

U. S. DEPARTMENT OF AGRICULTURE NEG. 46819 BUREAU OF AGRICULTURAL ECONOMICS

**The trend in the United States civilian per capita consumption of commercial fishery products was slightly upward before the war. During the war period 1942 to 1945, large purchases for United States military agencies and for export to allied Nations limited supplies of canned fish available for domestic distribution, thus causing a decline in the civilian consumption of fishery products. With increased commercial output of fish, consumption resumed its upward trend after 1943. The quantity of cured fish consumed in the United States has been relatively small and has been declining.**

# THE NATIONAL FOOD SITUATION

Approved by the Outlook and Situation Board, July 28, 1948

## SUMMARY

Recently brightened prospects for over-all 1948 production of crops will not materially affect the level of food consumption for this year, but improves the outlook for 1949. Although total crop production may set a new record in 1948 according to July 1 reports, food crops are down slightly from 1947 and better feed crops cannot materially affect production of livestock and livestock products until 1949.

Food consumption in the United States during the late summer and fall will be high compared with prewar years but will continue somewhat below the level of the last two years. Compared with recent months, seasonally larger supplies of chicken and turkey, fresh fruits and vegetables, sweetpotatoes, dry beans and peas, and rice will be on the market. But supplies of meat (until October), eggs, and dairy products will be seasonally smaller. Retail food prices are likely to continue at high levels throughout the remainder of the year even though the export demand for food from the United States may be lower than a year ago.

Food consumption per capita by United States civilians in 1948 will be slightly lower than last year, but still about 12 percent above the 1935-39 average. For 1948 as a whole, increases from last year's rate of per capita consumption are indicated for fresh and frozen fish, evaporated milk, margarine, and canned fruits and juices. These are more than offset by the decline in the available supplies of meats, chicken and turkey, ice cream, butter, fresh deciduous fruits, fresh vegetables, sweetpotatoes, corn products and sugar. Supplies of most livestock products are down from the highs of recent years, but still above the consumption rates of the late 1930's.

For only a few items is the per capita consumption rate falling below the prewar, 1935-39 average. These commodities are canned fish, sweetpotatoes, butter, and perhaps shortening and other edible fats and oils. Although the consumption rates of potatoes and wheat products are still above the levels of the late 1930's, there are indications that they are resuming their long-time downward trend after increasing during the war because of the relative shortage of other foods.

Retail food prices for 1948 are expected to average higher than in 1947. The high level of economic activity, strong consumer demand for food, and declines in production of meat and other livestock products are among the major factors responsible for the high level of retail food prices. Smaller exports are a minor offsetting factor.

A special article, "Supply and Distribution of Fishery Products in the Continental United States, 1930-47", appears on page 19.

Table 1.-Volume of agricultural production for sale and for farm home consumption and civilian per capita food consumption, 1945-47 and preliminary estimates for 1948 with percentage comparisons

(Index numbers, 1935-39 = 100)

| Item | 1943 | 1944 | 1945 | 1946 | 1947 | 1948 Prel. 1/ | 1948 as a percentage of 1947 |
|---|---|---|---|---|---|---|---|
| Food grains 2/ | 116 | 148 | 155 | 164 | 196 | 178 | 91 |
| Truck crops 3/ | 124 | 137 | 142 | 158 | 140 | 137 | 98 |
| Fruits and nuts 4/ | 108 | 123 | 112 | 133 | 126 | 125 | 99 |
| Vegetables, excluding truck crops 5/ | 125 | 106 | 110 | 128 | 107 | 106 | 99 |
| Sugar crops 6/ | 81 | 81 | 94 | 103 | 110 | 95 | 86 |
| Total food crops 7/ | 116 | 129 | 130 | 145 | 147 | 139 | 95 |
| Meat animals 8/ | 150 | 155 | 147 | 145 | 144 | 130 | 90 |
| Poultry 9/ | 152 | 153 | 163 | 153 | 150 | 141 | 92 |
| Dairy products 10/ | 113 | 115 | 119 | 120 | 120 | 118 | 98 |
| Total food livestock | 138 | 141 | 141 | 138 | 137 | 128 | 93 |
| Food production | 133 | 138 | 138 | 140 | 140 | 131 | 94 |
| Agricultural production, food and non-food | 128 | 136 | 133 | 136 | 136 | 131 | 96 |
| Civilian per capita food consumption | 109 | 112 | 114 | 118 | 116 | 112 | 97 |

1/ Production estimates are based on preliminary crop indications as of July 1 and estimated marketings and home consumption of livestock and livestock products for the calendar year 1948.
2/ Includes wheat, rye, rice, and buckwheat.
3/ Includes truck crops for market (artichokes, asparagus, lima beans, snap beans, beets, cabbage, cantaloups, carrots, cauliflower, celery, cucumbers, eggplant, lettuce, onions, peas, peppers, spinach, tomatoes, and watermelons) and truck crops for processing (asparagus, lima beans, snap beans, beets, cabbage, sweet corn, cucumbers, peas, spinach, and tomatoes).
4/ Includes apples, peaches, pears, cherries, apricots, grapes, strawberries, cranberries, oranges, grapefruit, lemons, olives, dried California figs, fresh and dried plums, almonds, pecans, and walnuts.
5/ Includes dry edible beans, potatoes, sweetpotatoes.
6/ Includes sugar beets, sugarcane for sugar, sugarcane sirup, sorgo sirup, maple sugar, and maple sirup.
7/ Includes peanuts in addition to the other crops.
8/ Includes cattle and calves, sheep and lambs, and hogs.
9/ Includes eggs, chickens, turkeys, and broilers.
10/Includes wholesale milk, retail milk, butterfat, farm butter, and farm consumption of dairy products.

Table 2 - Total food disappearance: Source and distribution, 1935-39 average and annual 1940-48 1/

| Year | Total food disappearance | Source of total food: Food production | Imports | Reduction in stocks | Increase in stocks | Distribution by claimants: Civilian | Military including military feeding | Department of Agriculture 2/: Net purchases | Deliveries | Reduction in stocks | Increase in stocks | Commercial exports and shipments 3/ |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | Percentage of food disappearance in each year | | | | | | | |
| 1935-39 Av. | 100.0 | 93.7 | 6.4 | | .1 | 97.4 | | | | | | 2.6 |
| 1940 | 100.0 | 94.9 | 5.5 | | .4 | 97.8 | | | | | | 2.2 |
| 1941 | 100.0 | 94.7 | 5.8 | | .5 | 94.0 | 1.9 | 2.6 | 2.4 | | .2 | 1.5 |
| 1942 | 100.0 | 94.0 | 3.8 | 2.2 | | 86.6 | 6.2 | 6.2 | 4.7 | | 1.5 | 1.0 |
| 1943 | 100.0 | 95.7 | 4.8 | | .5 | 81.0 | 9.9 | 7.9 | 7.0 | | .9 | 1.2 |
| 1944 | 100.0 | 94.0 | 4.8 | 1.2 | | 78.3 | 12.9 | 6.6 | 7.1 | .5 | | 2.2 |
| 1945 | 100.0 | 94.3 | 4.9 | .8 | | 81.8 | 12.2 | 4/4.0 | 4.8 | .8 | | 2.0 |
| 1946 | 100.0 | 96.4 | 4.1 | | .5 | 89.8 | 3.4 | 4/4.3 | 5.3 | 1.0 | | 2.5 |
| 1947 | 100.0 | 95.5 | 4.9 | | .4 | 89.5 | 3.3 | 4/2.8 | 2.7 | | .1 | 4.4 |
| 1948 Prel. | 100.0 | 94.4 | 4.6 | 1.0 | | 91.7 | 3.5 | 1.4 | 1.6 | .2 | | 3.4 |
| | | | | | Percentage of 1935-39 food disappearance | | | | | | | |
| 1935-39 Av. | 100.0 | 93.7 | 6.4 | | .1 | 97.4 | | | | | | 2.6 |
| 1940 | 109.7 | 104.1 | 6.0 | | .4 | 107.2 | | | | | | 2.5 |
| 1941 | 113.8 | 107.8 | 6.6 | | .6 | 106.9 | 2.2 | 3.0 | 2.7 | | .3 | 1.7 |
| 1942 | 124.6 | 117.2 | 4.7 | 2.7 | | 107.9 | 7.7 | 7.7 | 5.8 | | 1.9 | 1.3 |
| 1943 | 130.3 | 124.7 | 6.3 | | .7 | 105.7 | 12.8 | 10.3 | 9.2 | | 1.1 | 1.5 |
| 1944 | 137.5 | 129.3 | 6.6 | 1.6 | | 107.7 | 17.7 | 9.1 | 9.7 | .6 | | 3.0 |
| 1945 | 137.1 | 129.3 | 6.8 | 1.0 | | 112.3 | 16.7 | 4/5.4 | 6.5 | 1.1 | | 2.7 |
| 1946 | 136.2 | 131.2 | 5.6 | | .6 | 122.3 | 4.6 | 4/5.9 | 7.2 | 1.3 | | 3.4 |
| 1947 | 137.4 | 131.2 | 6.8 | | .6 | 123.1 | 4.5 | 4/3.8 | 3.7 | | .1 | 6.0 |
| 1948 Prel. | 130.1 | 122.8 | 6.0 | 1.3 | | 119.3 | 4.5 | 1.9 | 2.2 | .3 | | 4.4 |

1/ The upper section of the table divides the total disappearance in each year (1) according to the source of the food, and (2) according to its distribution. Both the total disappearance figure and the breakdown are on an index number basis, that is, they represent quantities weighted by average farm prices in the period 1935-39. The disappearance figure includes both domestically produced and imported foods. The lower portion of the table contains the same data expressed as a percentage of total food disappearance in 1935-39 instead of total disappearance in each year. 2/ The quantities assigned to the Department of Agriculture are principally food for lend-lease and relief. These quantities are measured in two ways: (1) in terms of Department of Agriculture purchases from commercial channels, and (2) in terms of shipments out of the country. When measured in terms of purchases, additions to Department of Agriculture stocks included. When measured in terms of shipments, additions to stocks are shown separately. Department of Agriculture shipments were smaller than the total quantities purchased from 1941 to 1943 and stocks were built up. In 1944 to 1946, however, shipments exceeded purchases and stocks were decreased. 3/ The 1935-39, 1940-41 exports and shipments are strictly commercial. For the war years, they approximate the commercial portion as indicated by total exports and shipments less the exports assignable to the Department of Agriculture. 4/ Including transfers for relief from military stocks in U. S.

Table 3.- Apparent civilian consumption of major food commodities on a per capita basis, calendar years, 1935-39 average, 1944, 1945, 1946, 1947 and preliminary estimates for 1948 with percentage comparisons 1/

| Commodity | Average 1935-39 | 1944 | 1945 | 1946 | 1947 | 1948 Prel. | 1948 as a percentage 1935-39 | 1948 as a percentage 1947 |
|---|---|---|---|---|---|---|---|---|
| | Pounds | Pounds | Pounds | Pounds | Pounds | Pounds | | |
| Meats (dressed weight) - Total | 126.2 | 153.5 | 144.5 | 153.7 | 155.2 | 145 | 115 | 93 |
| Beef | 55.2 | 55.3 | 59.1 | 61.4 | 69.2 | 63 | 114 | 91 |
| Veal | 8.1 | 12.3 | 11.8 | 9.9 | 10.7 | 10 | 123 | 93 |
| Lamb and mutton | 6.8 | 6.6 | 7.3 | 6.7 | 5.3 | 5 | 74 | 94 |
| Pork (excluding lard) | 56.1 | 79.3 | 66.3 | 75.7 | 70.0 | 67 | 119 | 96 |
| Fish (edible weight) - Total | 11.1 | 8.9 | 10.6 | 11.1 | 10.8 | 11.0 | 99 | 102 |
| Fresh and frozen | 5.3 | 5.6 | 7.1 | 6.3 | 6.2 | 6.5 | 123 | 105 |
| Canned 2/ | 4.8 | 2.8 | 2.6 | 3.8 | 3.8 ) | | | |
| Cured | 1.0 | .7 | .9 | 1.0 | .8 ) | 4.5 | 78 | 98 |
| Poultry products | | | | | | | | |
| Eggs 3/ | 37.3 | 43.8 | 49.6 | 46.8 | 47.5 | 47.5 | 127 | 100 |
| Chicken (dressed weight) | 17.9 | 26.8 | 28.9 | 25.5 | 23.4 | 22.7 | 127 | 97 |
| Turkey (dressed weight) | 2.6 | 3.3 | 4.3 | 4.5 | 4.5 | 3.2 | 123 | 71 |
| Dairy products | | | | | | | | |
| Total milk (whole milk equivalent) | 801 | 780 | 794 | 810 | 793 | 773 | 97 | 97 |
| Cheese | 5.5 | 4.9 | 5.9 | 6.9 | 7.0 | 7.0 | 127 | 100 |
| Condensed and evaporated milk | 16.7 | 16.1 | 18.3 | 18.8 | 19.5 | 20.5 | 123 | 105 |
| Fluid milk and cream | 340 | 412 | 433 | 421 | 401 | 395 | 116 | 99 |
| Fats and oils - Total, fat content 4/ | 44.7 | 41.2 | 39.5 | 39.6 | 41.7 | 41.5 | 93 | 100 |
| Butter, farm and factory (actual weight) | 16.7 | 12.0 | 10.8 | 10.3 | 11.2 | 10.2 | 61 | 91 |
| Lard | 11.0 | 12.6 | 11.5 | 11.8 | 12.5 | 12.5 | 114 | 100 |
| Margarine (actual weight) | 2.9 | 3.9 | 4.0 | 3.8 | 5.0 | 5.9 | 203 | 118 |
| Shortening | 11.7 | 9.2 | 10.0 | 10.1 | 9.3 | 9.3 | 79 | 100 |
| Other edible fats & oils | 6.3 | 6.6 | 6.0 | 6.3 | 6.9 | 6.7 | 106 | 97 |
| Fruits | | | | | | | | |
| Fresh - total | 137.7 | 143.6 | 143.7 | 140.6 | 146.0 | 136 | 99 | 93 |
| Citrus | 48.9 | 67.8 | 65.4 | 58.3 | 62.0 | 56 | 115 | 90 |
| Apples (Commercial) | 30.4 | 25.4 | 22.9 | 23.1 | 25.2 | 25.5 | 84 | 101 |
| Other (excluding melons) | 58.4 | 50.4 | 55.4 | 59.2 | 58.8 | 54.4 | 93 | 93 |
| Processed | | | | | | | | |
| Canned fruit | 14.9 | 9.3 | 14.7 | 21.1 | 18.7 | 20 | 134 | 107 |
| Canned juices | 3.9 | 9.9 | 10.3 | 16.5 | 15.1 | 16 | 410 | 106 |
| Frozen | .8 | 2.0 | 2.3 | 3.1 | 3.2 | 3.2 | 400 | 100 |
| Dried | 5.8 | 6.1 | 6.1 | 5.0 | 5.2 | 5.2 | 90 | 100 |
| Vegetables | | | | | | | | |
| Fresh | 235 | 254 | 265 | 271 | 251 | 249 | 106 | 99 |
| Canned | 31.1 | 34.6 | 43.1 | 46.3 | 40.5 | 39.4 | 127 | 97 |
| Frozen | 5/ .4 | 1.4 | 1.7 | 2.0 | 2.6 | 2.6 | 650 | 100 |
| Potatoes | 131 | 127 | 129 | 125 | 125 | 125 | 95 | 100 |
| Sweetpotatoes | 21.4 | 19.5 | 18.8 | 18.3 | 16.1 | 14.1 | 66 | 88 |
| Dry edible beans | 8.8 | 7.7 | 7.7 | 8.7 | 8.4 | 8.4 | 95 | 100 |
| Sugar (refined) | 96.5 | 89.1 | 73.6 | 74.7 | 95.9 | 90 | 93 | 94 |
| Grains | | | | | | | | |
| Corn products: | | | | | | | | |
| Corn meal | 22.9 | 20.4 | 19.9 | 16.7 | 17.1 | 17 | 74 | 99 |
| Corn sirup | 7.7 | 13.5 | 13.7 | 12.5 | 13.2 | 10 | 130 | 76 |
| Corn starch | 1.3 | 1.4 | 1.8 | 1.8 | 1.9 | 1.7 | 131 | 89 |
| Corn sugar | 2.7 | 3.9 | 3.8 | 3.8 | 4.5 | 3.5 | 130 | 78 |
| Breakfast cereals | 1.7 | 2.5 | 2.5 | 2.2 | 2.6 | 2.4 | 141 | 92 |
| Hominy | 1.2 | 1.8 | 1.7 | 1.5 | 1.8 | 1.7 | 142 | 94 |
| Oatmeal | 3.9 | 3.2 | 4.1 | 4.3 | 3.9 | 4.0 | 103 | 103 |
| Barley food products 6/ | 1.2 | 1.4 | 1.5 | 1.8 | 1.8 | 1.7 | 142 | 94 |
| Wheat: | | | | | | | | |
| Flour 7/ | 153.1 | 162.2 | 160.7 | 153.4 | 143.8 | 146.4 | 96 | 102 |
| Breakfast cereals | 3.7 | 3.7 | 3.7 | 3.5 | 3.6 | 3.6 | 97 | 100 |
| Rye flour | 2.2 | 2.6 | 2.6 | 1.9 | 1.7 | 1.9 | 86 | 112 |
| Rice, milled | 5.6 | 4.9 | 4.7 | 4.1 | 4.9 | 5.1 | 91 | 104 |
| Beverages | | | | | | | | |
| Coffee 8/ | 14.0 | 15.7 | 16.3 | 20.0 | 17.4 | 17.2 | 123 | 99 |
| Tea | .67 | .53 | .59 | .53 | .57 | .5 | 75 | 88 |
| Cocoa beans | 4.4 | 3.6 | 4.0 | 4.1 | 4.1 | 4 | 91 | 98 |
| Peanuts (shelled) | 4.4 | 5.8 | 6.4 | 5.0 | 4.4 | 4.4 | 100 | 100 |

Population estimates used to obtain per capita consumption figures are official Census estimates of total population adjusted for underenumeration of children under 5 and for military personnel not eating out of civilian supplies.

1/ Data on calendar year basis except for dried fruits which are on a pack year basis; fresh citrus fruits and peanuts on a crop year basis, rice on August 1 year. All years begin in year indicated except for fresh citrus, which begins in October of the previous year and rice which begins in August of previous year. 2/ Excludes canned food products containing small quantities of fish such as clam chowder, etc. 3/ In terms of number of eggs, the apparent per capita consumption was 298 in 1935-39, 350 in 1944, 397 in 1945, 374 in 1946, 380 in 1947 and 380 estimated for 1948. 4/ Computed from unrounded data. 5/ Average 1937-39. Data prior to 1937 are not available. 6/ All barley food products in terms of malt equivalent. 7/ Includes white, whole wheat, and Semolina flour. 8/ Green bean basis.

## NUTRITIONAL REVIEW 1/

Based on current estimates of some decline in the general level of food consumption, per capita supplies of the major nutrients probably will be slightly smaller in 1948 than in 1947.

Supplies of most nutrients in 1948 will still be well above the 1935-39 average. Food energy will be about the same but the quantities of other nutrients will range from 5 to 38 percent above the 1935-39 average. The major increases are in iron, thiamine, riboflavin and niacin which are partly due to the enrichment of grain products. In estimating the nutritive value of the food supply, the same degree of enrichment has been assumed as under wartime enrichment requirements.

Dairy products are the chief source of the calcium and riboflavin available in the 1948 food supply. About equal quantities of protein are furnished by the three food groups, dairy products; meat, poultry, and fish; and grain products. Leafy, green, and yellow vegetables contribute the highest percentage of vitamin A, and citrus fruits and tomatoes the most vitamin C. Food energy, iron, and thiamine are supplied in the largest quantities by grain products, and niacin by the meat, poultry, and fish group.

Table 4.- Nutrients available for civilian consumption per capita per day, calendar years, 1935-39 average, 1943 to 1947 and preliminary indications for 1948 with percentage comparisons 1/

| Nutrients | Units | Average 1935-39 | 1943 Rev. | 1944 | 1945 | 1946 | 1947 Prel. | 1948 Indications | 1948 as a percentage of 1935-39 | 1948 as a percentage of 1947 |
|---|---|---|---|---|---|---|---|---|---|---|
| Food energy | Cal. | 3,250 | 3,420 | 3,470 | 3,370 | 3,380 | 3,420 | 3,330 | 102 | 97 |
| Protein | Grams | 89 | 100 | 100 | 103 | 100 | 98 | 95 | 107 | 97 |
| Fat | Grams | 132 | 144 | 145 | 138 | 145 | 144 | 140 | 106 | 97 |
| Carbohydrate | Grams | 428 | 430 | 440 | 428 | 418 | 433 | 422 | 99 | 97 |
| Calcium | Grams | .90 | 1.02 | 1.04 | 1.08 | 1.12 | 1.07 | 1.06 | 118 | 99 |
| Iron | Mg. | 13.8 | 16.9 | 18.5 | 19.0 | 18.7 | 18.3 | 17.7 | 128 | 97 |
| Vitamin A | I.U. | 8,100 | 9,200 | 9,400 | 9,800 | 9,300 | 8,900 | 8,500 | 105 | 96 |
| Thiamine | Mg. | 1.54 | 2.21 | 2.28 | 2.24 | 2.27 | 2.15 | 2.12 | 138 | 99 |
| Riboflavin | Mg. | 1.86 | 2.21 | 2.48 | 2.55 | 2.56 | 2.45 | 2.41 | 130 | 98 |
| Niacin | Mg. | 15.4 | 19.5 | 21.6 | 21 9 | 21.5 | 20.7 | 20.1 | 131 | 97 |
| Ascorbic acid | Mg. | 115 | 126 | 132 | 139 | 136 | 129 | 128 | 111 | 99 |

1/ Data computed by the Bureau of Human Nutrition and Home Economics on the basis of estimates of apparent civilian consumption (retail basis) including estimates of consumption from urban gardens, supplied by the Bureau of Agricultural Economics. No deductions have been made in the nutrient estimates for the loss of waste in the home or for the destruction or loss of nutrients during the preparation of food. Deductions have been made for inedible refuse. The data for iron, thiamine, riboflavin, and niacin include the amounts of these nutrients added to white bread and flour under the enrichment program. The 1947 and 1948 estimated assume that voluntary enrichment will continue at the rate required under WFO-1.

1/ Prepared in cooperation with the Bureau of Human Nutrition and Home Economics.

## RETAIL FOOD PRICES

Retail food prices in the past few months have more than recovered from the declines of February and March. The Bureau of Labor Statistics retail food price index for June was 214, six percent above the March level and slightly above the January peak.

During the next few months some further increase from the present level of retail food prices appears possible. Although the volume of food exports from the United States is expected to be smaller than a year earlier, other factors which have had an inflationary influence on food prices in the recent past are likely to continue strong. Among the demand influences which will tend to keep food prices above last year's are the continued high level of economic activity, the recent reduction in income taxes which will add about 5 billion dollars to consumer spendable income this year, the third round in wage rate increases, the appropriation of about 6 billion dollars for foreign aid, and the increasing volume of national defense expenditures. On the supply side, the decline in the output of meat and other livestock products contribute to higher food prices.

## COMMODITY REVIEWS

### Meats

Meat supplies through the remainder of 1948 are expected to continue moderately smaller than a year earlier, although they will increase seasonally this fall. Short corn supplies from the 1947 crop and reduced numbers of livestock on farms will contribute to below record, although above average, meat supplies. Pork supplies for the summer months are from the preceding fall's pig crop. While that crop was slightly larger than a year earlier, hogs from it were marketed rapidly and by June 1 there was a slightly smaller number of hogs on farms than on June 1, 1947. Further reducing meat supplies for the remainder of the year is the 3 percent decline from 1947 in the spring pig crop which is marketed during the late fall and winter months. Marketings from this crop are likely to be delayed for feeding out of the new corn crop. Supplies of other meat will also be down during coming months due to the smaller lamb crop, fewer cattle and the reduced number of cattle now being grain fed for market. No beef, veal, lamb or pork has been allocated or planned for export to European countries under ECA.

Although meat output in January-June was significantly smaller than in comparable periods of the previous 5 years, United States civilian supplies have not been proportionately reduced. Practically no meat has been exported, although usual minor shipments to territories have been made. Only relatively small purchases have been made for military use. In early March stocks of meat were above average, but they declined more than usual during the 2 months of the packinghouse strike. July 1 stocks were much larger than a year earlier and were moderately larger than the July 1 average for the past five years.

Meat consumption in the first quarter of this year was slightly less than in that quarter of 1947, and substantially less than the near record consumption during the same period of 1946. Preliminary reports of production and disposition indicate that consumption in the second quarter of this year fell considerably below the first quarter, and was moderately less than a year earlier. On the other hand, consumption was higher than in the second quarter of either 1945 or 1946.

Canned meat supplies in the first half of 1948 were greater than a year earlier. Production under Federal inspection in January-June totaled 500 million pounds (product weight) compared with 478 million pounds a year earlier. In addition imports of canned meat and military purchases were smaller than in the first half of 1947. Canned beef from South America is the most important meat import of the United States.

Meat prices have continued to rise since January and prices in early July were the highest of record. In June retail prices of meat, as reported by the Bureau of Labor Statistics averaged 9 percent higher than in January, 18 percent higher than a year earlier and more than two and a half times the average for 1935-39. Indications are that prices rose to higher levels in July and a further rise in meat prices is likely as meat production declines during the summer.

For the year 1948 as a whole, civilian meat consumption is expected to average about 145 pounds per person (dressed meat basis), approximately 10 pounds less than the 155 pounds consumed in 1947 but almost 20 pounds greater than average consumption in 1935-39. Consumption of beef in 1948 may be about 6 pounds less than the large consumption of 69 pounds in 1947. Pork consumption may be reduced around 3 pounds from 1947 with most of the reduction coming in the second half of the year.

Meat production this year is expected to total about 21.3 billion pounds, dressed-meat basis, 2 billion pounds less than in 1947, and 4 billion less than the record of 1944. However, this year's output is expected to be a third greater than production in 1935-39 which averaged 16.2 billion pounds.

Because of the expected delay in marketings this fall, hog slaughter in the first 9 months of 1949 may be slightly larger than in that period of 1948 and slaughter weights are expected to be unusually heavy. A sharp increase in the number of pigs saved in the spring of 1949 is likely, if feed grain crops turn out as large as now expected. The increase in production would boost pork output beginning in late 1949 when those pigs are ready for market. The record large corn crop in prospect this year is expected to increase the number of grain fed cattle marketed in 1949 over the relatively small number of fed cattle marketed this year. However, total slaughter of cattle in 1949 is not expected to be as large as this year because of fewer cattle on farms.

Fish 1/

Civilian consumption of fish, especially fresh and frozen, during the remainder of the year is expected to be larger than it was during the same months of 1946 and 1947. Total supplies of fishery products during the latter part of 1948 probably will be much larger than a year earlier since consumer demand at prevailing prices is likely to encourage more extensive production activity and larger imports. However, canned fish supplies may not be much greater than last year. Although the 1948 production season is not yet in full swing, canned tuna production is about the same as in the comparable period last year, but the output of salmon and sardines (pilchards and Atlantic sea herring) is lower.

The Bureau of Labor Statistics reported the price of fresh and frozen fish for the month of June at 252 percent of the price in the prewar base period. June is one of the months in which fresh and frozen fish prices are seasonally low, so a price rise during the latter half of the year is to be expected.

Civilian consumption of fish in 1948 is expected to exceed the per capita rate of 10.8 pounds (edible weight) of last year 2/. Fresh and frozen fish consumption is likely to account for a large part of the increase. The relatively high price of other high protein foodsprobably will continue to encourage increased consumption of fishery products.

Stocks of fresh and frozen fish in cold storage on July 1, 1948 totaled 95 million pounds, an increase of about 17 percent over the June 1 holdings and 12 percent above the stocks on July 1 a year earlier. Beginning about May, cold storage stocks of fish generally increase until the latter months of the year. Packers' stocks of most of the popular species of canned fish (salmon, sardines - which are pilchards and Atlantic sea herring, and tuna) are small in size.

Commercial fish freezing operations this year are much larger than a year ago. From January 1 through June 1948 the total amount of fish frozen (for human food and non-food use) was about 123 million pounds, a 50 percent increase over the same period last year. During the month of June commercial freezing of fish for human consumption amounted to over 40 million pounds, slightly larger than the output in May and about 70 percent above June 1947.

Imports of fish during the first 6 months of 1948 were much greater than in the same period the year before. Through June, receipts from offshore of fresh and frozen groundfish fillets (cod, haddock, hake, pollock and cusk) including rosefish, major fish import items, amounted to 25 million pounds, more than twice the volume of imports during the first half of 1947 but practically equal to those received during the same period in 1946. Indications are that for the year as a whole, imports will be much larger than in 1947 and may even exceed the 1946 record.

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1/ Prepared in cooperation with the Fish and Wildlife Service of the Department of Interior..

2/ See special article "Supply and Distribution of Fish in the United States, 1930-47" in this issue for definitions of terms and historical data.

Military procurement of fish in 1948 is expected to exceed the total of 25 million pounds (edible weight) taken last year. Canned fish procurement plans for this year call for the purchase of about 27 million pounds out of the current year's pack. This is more than 2 1/2 times the quantity procured in 1947. Fresh and frozen fish purchases are expected to exceed the total of 15 million pounds taken in 1947.

Exports and shipments of fish in 1948 are expected to be less than the total of 177 million pounds (edible weight) reached last year. During the first 4 months of this year exports and shipments of fish were more than 60 percent below the corresponding period of 1947.

Poultry and Eggs

Supplies of eggs will be seasonally smaller during the next few months but chicken and turkey supplies will be seasonally larger. As compared with the latter part of 1947, egg supplies this fall will be nearly as great, chicken supplies slightly smaller and turkey supplies considerably smaller.

Egg consumption in the second half of 1948 is expected to fall slightly below the rate of the last half of 1947. Egg production later this year will be smaller than a year earlier by perhaps 5 percent, reflecting both fewer mature hens now on farms and the 13 percent decline in numbers raised for flock replacement. These reductions in egg output will be partly offset by the larger storage holdings carried over from the first half of the year. Egg production during the first half of 1948 was 2 percent smaller than a year earlier. Consumer demand for eggs, on the other hand, because of larger incomes and higher meat prices, was substantially stronger and so was the demand for eggs for storage. Retail prices for the most popular grade of eggs averaged 66.6 cents per dozen in January-June this year according to BLS reports for large cities, compared with 61.5 cents per dozen in the corresponding months of 1947.

For 1948 as a whole, egg consumption will about equal the near record 380 eggs consumed per person in 1947. With prospective consumer incomes large relative to supplies of high protein foods, egg prices probably will be higher than a year earlier during most of the remainder of 1948.

Supplies of chicken are expected to be somewhat smaller from now until early spring than they were in the same 1947-48 period. Compared with 1947 a substantial increase in broiler output will only partly offset the reduction in sales from farm flocks. The principal reason for the smaller chicken supplies from egg producing farms is the reduction in numbers. On the other hand, farmers in the mid-West particularly may feed their chickens to heavier weights later this year as the feed situation improves following the very large grain harvest. With moderately smaller chicken supplies in the remainder of this year than in the latter part of 1947 and stronger consumer demand for chicken, prices will be slightly higher than in the corresponding months of 1947.

Supplies of turkey for the 1948 Thanksgiving and Christmas holiday season will be the smallest since the late 1930's. For 1948 as a whole, consumption will be slightly over 3 pounds per person, compared with the record of 4.5 pounds in 1947 and 1935-39 average of 2.6 pounds. Retail turkey prices are likely to reach new record highs this year.

Dairy Products

Civilian supplies of dairy products during the remainder of 1948 will be smaller in total than a year earlier and seasonally smaller than in the first half of this year. Milk production on farms has been 4 percent below 1947 so far this year and is not likely to reach last year's rate until toward the end of 1948 at the earliest.

Fluid milk and cream consumption is about the same as a year ago but the comparative level of consumption varies substantially among localities. In the New York City area, for example, reported consumption in June was 3 percent less than in June 1947.

With lower milk production and continued marketing of large quantities of milk for fresh use, supplies of milk for manufacturing have been considerably smaller this year than last. In the first 5 months of this year, butter production was down 15 percent, cheese 15 percent, and ice cream 10 percent. Although output of evaporated milk in January was less than in January 1947, it increased more than seasonally, and output for the first 5 months was the same as a year earlier. Dry whole milk was greater by 13 percent. Production of nonfat dry milk was 13 percent smaller than in the first 5 months of 1947.

With large feed supplies in prospect for this fall and more favorable relationships between dairy and feed prices, farmers will feed their cows at higher rates and may tend to cull herds less closely than in comparable months of 1947.

Retail prices in New York City in early July were 18 percent higher than a year ago. Prices at retail in all markets are higher than last year, but by smaller amounts than in New York. In 25 major cities of the United States, the retail price in early July was 20.8 cents per quart this year compared with 18.5 cents per quart in July 1947, an increase of 12 percent. Retail prices of most dairy products will continue substantially higher than last year through the remainder of 1948; the degree of increase over 1947 is likely to become less toward the end of the year. In mid-July, wholesale prices of dairy products were higher than a year earlier by the following percentages: butter, 18 percent; cheese, 42 percent; evaporated milk, 19 percent; condensed milk, 18 percent; dry whole milk, 19 percent; and nonfat milk, 64 percent.

A factor in the current demand for dairy products is the export demand. However, such purchases are smaller than in recent years. Most important in price advances is the record strong purchasing power of consumers in this country in the face of slightly smaller over-all supplies of dairy products.

Fats and Oils

The total supply of food fats and oils this summer is relatively small. Stocks of such fats on July 1 were materially lower than a year earlier and production of lard and soybean oil will decline more than seasonally this summer. However, only relatively small quantities will be exported in the July-September quarter, substantially less than in recent months or in July-September 1947. Consumption may continue at nearly the same rate as in the first half of the year, but in that event carry-over stocks of food fats and oils will be reduced to an especially low level by October 1.

Production of new-crop vegetable oils will be under way in volume during the fall season. Total output of cottonseed and soybean oils during 1948-49 will increase materially over 1947-48, if favorable weather continues this summer.

Butter production has been at a very low level, resulting from the relatively high rate of fluid milk and cream consumption which has continued during the period of reduced milk output. With the season of lowest output ahead and stocks no larger than a year ago, butter supplies will continue small.

Margarine output and consumption is larger this year than in 1947. During the first four months of 1948 manufacturers shipped 310 million pounds for domestic consumption, almost 30 percent more than in the same period a year earlier.

Lard output during the remainder of 1948 will be smaller than in July-December 1947. The decline will result principally from fewer hogs slaughtered. However, part of the decline probably will be offset by a reduction in lard exports, compared with the last half of 1947 and with the first half of 1948.

Production of food fats and oils in the first half of 1948 was smaller than in January-June 1947 largely because of reduced butter output. Exports of lard and vegetable oils were larger than a year earlier. However, there was a small net withdrawal of food fats and oils from storage in the first 6 months of 1948 in contrast to the first half of 1947 when a substantial quantity of food fats and oils was added to stocks.

Civilian consumption of food fats and oils in 1948 probably will be about the same per person as in 1947, when it amounted to 41.7 pounds per person (fat content). Consumption of butter probably will be nearly 1 pound per person less, and margarine consumption nearly 1 pound per person more, or a consumption (fat-content basis) of about 8 pounds of butter and 4 pounds of margarine. On an actual weight basis, consumption of butter is expected to be about 10 pounds per capita and margarine 5 pounds.

Total output of crude cottonseed, soybean, corn, and peanut oils will be somewhat larger in 1948 than 1947 if favorable weather continues this summer. The increased production of margarine probably will absorb most of the additional vegetable oil available. Production and consumption of shortening and refined edible oils are likely to be approximately the same as in 1947. Exports of margarine, shortening and edible oils probably will total nearly the same this year as last. Imports of edible olive oil have increased this year but only make up 1 to 2 percent of the total supply of vegetable oils for food use.

The retail price of butter in the first 6 months of 1948 averaged 21 percent higher than a year earlier. Retail prices of other food fats were lower, from 2 percent in the case of margarine to 8 percent in the case of lard. Since butter production is likely to remain smaller than a year earlier, the price probably will average higher than in corresponding months of 1947. The price of lard may rise this summer as production declines. Prices of other food fats may average moderately less in the latter half of 1948 than in the first half. Wholesale prices of cottonseed and soybean oils, the leading ingredients in margarine, shortening, cooking and salad oils, declined sharply in the first half of July from high spring levels.

Table 5. - Food fats and salad dressing: Retail price per pound in leading cities of the United States 1947-48

| Period | Butter | Margarine | Lard | Shortening in containers other than cartons | Salad dressing |
|---|---|---|---|---|---|
| | Cents | Cents | Cents | Cents | Cents |
| Average Jan. - June 1947 ..... | 75.4 | 42.6 | 33.0 | 46.7 | 40.2 |
| July - Dec. 1947 ..... | 85.6 | 39.1 | 30.0 | 42.0 | 36.7 |
| Jan. - June 1947 ..... | 91.2 | 41.9 | 30.2 | 44.7 | 39.0 |

Compiled from reports of the Bureau of Labor Statistics.

Fruit

Supplies of most fresh fruits will be slightly to moderately smaller this summer and early fall than in the same part of 1947, because of smaller production. Canned fruits and fruit juices, frozen fruits, and dried fruits are expected to be about as plentiful as a year earlier. Retail prices probably will be near last year's levels.

Supplies of fresh apples, peaches, and pears probably will be moderately smaller than last summer. Supplies of other fresh deciduous fruits will be nearly as large as last summer and those of a few may be slightly greater. The 1948 deciduous fruit crop will be somewhat smaller than the 1947 crop but near average. Total production of the eight major fruits--(apples, apricots, cherries, grapes, peaches, pears, plums, and prunes) is estimated to be about 8 percent smaller than in 1947. Production of s ix of these crops is indicated to be smaller than last year by the following percentages: apples, 11 percent; grapes, 2; peaches, 15; pears, 25; plums, 6; and prunes, 4 percent. On the other hand, production of apricots is estimated to be 35 percent larger, and cherries 12 percent larger.

As usual, principal supplies of fresh citrus fruit during summer and early fall will consist of Valencia oranges, grapefruit, and lemons from California and limes from Florida. Supplies of oranges will be moderately smaller than last summer, but little change is indicated for grapefruit, lemons and limes.

Imports of bananas are expected to increase further this year so that they will slightly exceed the prewar volume. Imports of other fruits, such as dried figs and dates, and canned pineapple and pineapple juice probably will be about as large in 1948 as last year. Commercial exports of fresh fruits may be no larger than in 1947 except possibly to Canada. Exports under the ECA program are still undetermined.

Early season indications point to a domestic pack of commercially canned fruit in 1948 nearly as la rge as the 1947 pack. The packs of apricots and sour cherries are expected to be larger than last year; those of sweet cherries and peaches probably will be about as large, while that of pears will be smaller. At the beginning of the new pack season, packer and distributor stocks of canned peaches and pears are reported to be considerably larger than a year ago, but packer stocks of apricots are moderately smaller. Total supplies of canned fruits are expected to be large enough to permit per capita consumption to continue at the 1947 rate of about 19 pounds or even to exceed it slightly.

Supplies of canned fruit juices are at a record level in 1948. This is the result primarily of the record large pack of canned citrus juices from the 1947-48 crop. For the first time in the history of the citrus industry, more oranges than grapefruit were processed this season, mostly into canned juice. As of early July about 31 percent of the orange crop and 48 percent of the grapefruit crop had been processed. The increased supplies of canned fruit juices will permit a slight increase in per capita consumption, perhaps a pound more than the 15 pounds consumed in 1947. Retail prices of canned citrus juices appear to have been relatively stable since last year.

Dried fruits are expected to continue plentiful at prevailing prices. Another large pack seems likely this year, about half of which will be raisins and most of the remainder dried prunes. Substantial quantitities of dried figs and dates but less than prewar probably will be imported to supplement domestic fruits. With the prospect that per capita consumption will continue at a level of about 5 pounds, total supplies again will be considerably in excess of domestic demand at prevailing prices..

A moderate increase is probable this year in the pack of frozen fruits, fruit juices, and berries. Much of this increase will consist of strawberries, which in 1947 comprised nearly one-third of the total pack. About 100 million pounds of frozen strawberries were in cold storage July 1,1948, compared with 75 million pounds a year earlier. Cold-storage stocks of frozen fruits on July 1 totaled 283 million pounds, 13 percent larger than on the same date last year. Per capita consumption of frozen fruits in 1948 probably will continue at or near the 1947 rate of about 3 pounds.

Prospects are favorable for a slightly larger crop of walnuts this year than in 1947, as large a crop of almonds, but a considerably smaller crop of filberts. However, total production of these three tree nuts, which are grown principally on the Pacific Coast, is expected to be slightly larger than last year.

Vegetables

Supplies of vegetables for fresh market this summer may not be quite as large as a year earlier. Incomplete reports on prospective production indicate a 7 percent decline with considerably above-average production of cantaloups, sweet corn, honey dew melons, lettuce and green peppers; substantial increases over last summer for cabbage, carrots, cauliflower, celery, onions and spinach. Offsetting these will be substantial reductions in lima beans, beets, green peas and watermelons from last year as well as from the 10-year average 1937-46.

During the first half of 1948 total commercial truck crop production for fresh market is estimated to have been only 6 percent below the 1946 record for the period and about the same as 1947. However, very small carry-in stocks of cabbage and onions added very little to the supplies of vegetables currently produced for the early months of the year so that per capita total supplies for the first half of the year were probably smaller than in 1947. Except for spinach retail prices prevailing in large cities for the six fresh vegetable items reported by BLS have been generally higher in each month of 1948 than in the same month a year earlier.

Canned and frozen vegetable supplies for the balance of the year may be slightly smaller than a year earlier. Packer and wholesaler stocks are below last year's level after heavy movement into retail channels in the first half of the year. Lower packs in 1947 than in 1946, together with heavy movement in recent months have brought packer and wholesale-distributor stocks of canned green and wax beans, corn, and tomato juice moderately below levels of a year earlier. Stocks of canned peas are slightly larger this summer; canned tomatoes, considerably larger. Commercial storage stocks of frozen vegetables are about one-fourth smaller than a year earlier, with an increase evident only for lima beans.

Early reports of acreage and production prospects indicate that production for commercial canning and freezing this year will be moderately lower than last year. Military use and exports will again take minor quantities, though there may be some increases over last year. Consumption of canned and frozen vegetables this year probably will not differ much on a per capita basis from 1947. Retail prices of canned and frozen vegetables have remained much more stable than those of fresh vegetables. Since both procurement and processing costs remain high, and there are in general no surplus stocks of canned and frozen vegetables, retail prices for most of these items through the rest of 1948 probably will continue as high or higher than at present.

Potato supplies will continue abundant but per capita consumption probably will be no larger than the rate in the past two years. Early potato production was very large. Prospects are that the intermediate potato crop will be slightly smaller this year but the late crop slightly larger than last.

Needs for potatoes for military use abroad, such as seed for occupied areas, probably will be about the same this year as last. Likewise little change is expected in total exports of potatoes for food purposes. Although fewer potatoes probably will be exported in fresh form, more may move in the form of potato flour. If enough surplus potatoes are available at appropriate times and if processing capacity is adequate, as many as 20 million bushels may be made into potato flour from the 1948 crop for use under Army auspices in occupied areas.

With considerably smaller supplies so far this year and the smallest crop since 1924 in prospect, per capita consumption of sweetpotatoes will be substantially lower this year than last. In fact the rate of consumption may be the smallest on record. The prospective 1948 crop of sweetpotatoes is 13 percent smaller than the 1947 crop and only about three-fourths of the 1937-46 average. The small crop results from the reduced acreage this year, a continuation of the downward trend which started after the 1932 peak of more than one million acres. The peak acreage was about twice as large as the 1948 acreage.

Per capita consumption of dry beans probably will continue at about last year's level of 8.4 pounds, and some increase in stocks will be possible. Stocks have been unusually low for several years. The 1948 crop of dry beans is expected to be about 6 percent larger than the 1947 crop and 9 percent above average. Total demand for dry beans, however, is expected to continue strong enough to keep retail prices near present levels and farm prices well about support levels.

Production of dry peas, on the other hand, is estimated to be less than half of last year's crop and only 57 percent of the 10-year average. Reduction in planted acreage, largely due to unfavorable weather, is responsible for most of the decrease in the size of the crop. Domestic consumption of dry peas probably will continue at about last year's level but few if any peas from the 1948 crop will be available for export.

Grains

Despite the near record wheat and the record corn crops now in prospect for this country, no major change in the rates of consumption of cereal food products is likely during the next few months. Domestic supplies of wheat products have been plentiful. It appears that per capita consumption of wheat products has been resuming its prewar downward trend. Prices of corn products thus far in 1948 have set new records, reflecting in part the all time high in corn prices. Decreases in prices and increases in the supplies of corn products are to be expected as the processing of supplies from the record new corn crop begins in the late fall.

The 1948 wheat crop is now estimated at 1,242 million bushels, second only to last year's crop of 1,365 million bushels. July 1 stocks this year were 195 million bushels, about 110 million above those of a year earlier.

Civilian wheat consumption out of the 1948 wheat crop is expected to be about the same as or slightly above that in the past two years, when it was nearly 500 million bushels. United States exports may total about 450 million bushels. In 1947-48 they were about 480 million bushels. Export requirements for wheat, now mostly under the FCA program, will continue heavy and will strengthen prices. With a record corn crop in prospect, the feeding of wheat probably will not exceed 150 million bushels compared with about 180 million in 1947-48. Seed and industrial use will total about 90 million bushels. Residual stocks next July 1 may be at about the level of the 1932-41 prewar average of 235 million bushels.

The crop outlook in Europe (excluding Soviet Russia) continues favorable and prospects indicate that the 1948 bread grain production will exceed 1946 and 1947, but will be about 13 percent below prewar. The larger European grain crops, if amply supplemented by imports, would permit some countries to abandon rationing of bread, and others to increase their rations.

However, because of the increase in population, the low level of reserve stocks of all food products, changes in the channels of trade, and the need for using food grains as a substitute for other foods in short supply, import requirements for wheat and rye in European countries will continue to be large and above prewar levels.

Civilian rye consumption out of the 1948 crop is expected to total about the same as the 1935-39 average of 6.8 million bushels, substantially higher than the 5.6 million used in the 1947-48 crop year. Feed use may be increased to possibly 7 million bushels from the estimated 5.0 million bushels in 1947-48. Alcohol and spirit use may be somewhat less, perhaps 6 million bushels, which compares with 6.7 million in 1947-48. Seed use will be about unchanged at 5 million bushels. With a crop indicated at 26.7 million bushels, these distribution figures point to the likelihood of some increase in the carry-over on July 1, 1949. The carry-over of 3.3 million bushels on July 1, 1948 was one of the smallest on record. Exports in 1947-48 totaled 2.7 million bushels. Rye prices in the past month have declined sharply, reflecting the new crop situation. Prices in 1948-49 are expected to be below those in 1947-48.

Civilian rice consumption may be somewhat higher during coming months following the new harvest. The indicated 1948 crop of 79.2 million bushels (rough rice basis) would be only slightly below the all-time record set last year.

A 1948 corn crop of 3,329 million bushels, as estimated on July 1, would be the largest crop on record, 39 percent above the small 1947 crop. Even with the small carry-over of corn in prospect next October 1 the 1948-49 supply of corn is expected to total about 3,450 million bushels or the second largest supply on record. This large supply of corn in prospect would enable farmers to feed much more corn to livestock than in the current marketing year. It also will provide a much larger commercial supply, which will make more corn available for industrial and food uses and for export. Carry-over stocks at the end of the 1948-49 crop year are expected to be much larger than the very small stocks on hand at the beginning of the year. The larger commercial supply of corn and more favorable price relationship of corn to competing products probably will result in larger production in 1948-49 of most of the food products produced from corn. Commercial supplies also probably will be sufficient to permit a marked increase from the very small exports of the current year in the quantity of corn exported. Exports may approximate the 127 million bushels of 1946-47.

During the current marketing year, prices of corn and corn products reached all-time highs. Prices of both corn and corn products have been lower in recent months than at the beginning of 1948. The much larger than average crop this year probably will result in a greater than usual decline in corn prices in the last half of 1948. Prices of corn and corn products are expected to average lower in 1948-49 than for the current season.

The supply of oats for 1948-49 based on indications in July is about 1,611 million bushels or 8 percent larger than in 1947-48. This would be the third largest supply on record. The oat crop of 1,426 million bushels exceeds last year's crop by more than 200 million bushels. The large supply of oats for the current marketing year will make available ample supplies of oats for processing into oatmeal, and also will probably result in some increase in exports. The price of oats has declined sharply during the past month and is expected to average lower during 1948-49 than for the past marketing year.

The barley supply for the 1948-49 crop year totals about 358 million bushels. This is 7 percent larger than last year, but except for the past 2 years is smaller than in any other year since 1939. A larger than usual percentage of the crop probably will go into commercial uses again in 1948-49 and a smaller than usual percentage into livestock feed. The carry-over of barley on July 1 totaled 51 million bushels, a little smaller than the carry-over last year. The 1948 crop of 307 million bushels was 10 percent larger than the 1947 crop. With larger supplies of barley and other feed grains, barley prices are expected to average somewhat lower in 1948-49 than in 1947-48. The sharp drop in barley prices since May brought market prices of barley at Minneapolis in early July to around 30 to 40 cents per bushel below the price of a year earlier. Market prices of barley malt, especially the lower grades, have declined considerably during the past 2 or 3 months.

Sugar

Distribution of sugar for civilian consumption in the United States in 1948 by primary distributors is expected to be lower than last year's level of 96 pounds (refined basis) per capita. Beet and cane sugar distribution by primary distributors during the first half of 1948 amounted to 3,249 thousand short tons (raw value), only 3 percent below the total for the same period a year earlier. For the last 6 months of this year distribution is likely to be smaller than in the comparable period of 1947 when it was unusually high following the termination of sugar rationing.

Recent labor disputes in some of the large cane sugar refineries located in the northeastern part of the United States may be a factor in the local shortages of sugar that were reported in some parts of that area. The shortages were sporadic and short lived.

Official estimates as of July 1 indicate that the 1948 sugar beet crop is about 18 percent below last year's crop from which 1,884 thousand short tons (raw value) of beet sugar were produced. The forecast for the continental United States sugarcane crop (for seed and sugar) indicates a 14 percent increase over the 1947 output which yielded 375 thousand short tons (raw value).

The marketing and import quotas authorized under the Sugar Act of 1948 currently total 7,200 thousand short tons (raw value) 200 thousand tons above the total authorized in May but below the original quota of 7,800 thousand short tons established in January. The present quota authorizes 2,261 thousand tons for sugar producers in continental United States and 4,939 thousand tons for off-shore producing areas.

# SUPPLY AND DISTRIBUTION OF FISHERY PRODUCTS IN THE CONTINENTAL UNITED STATES, 1930-47 1/

## SUMMARY

The annual consumption of fishery products in the continental United States since 1930 has ranged from about 8 to 12 pounds (edible basis 2/) per person (see table 8.) 3/ In general, fish consumption has been increasing. Consumption in 1931 dropped more than a pound per capita below the 1930 level of 10.5 pounds, and declined again by almost a half pound during 1932. From that time on the trend was upward until the onset of World War II. After a 3-1/2 pound decline from the previous year in 1942 due to unusually large canned fish purchases by non-civilian claimants, consumption again increased and by 1946 the prewar consumption level was regained.

The general upward trend in fish consumption from 1932 to 1941 is due principally to technological advances and increased efficiency in the processing and distribution of fish. In the past, fish consumption was heaviest in the coastal areas of the United States. With the development of better production machinery, new methods of preparing and preserving fish by freezing, improved means of transportation and more adequate local storage facilities, more commercial fishery products have been successfully merchandized in inland areas.

In addition wartime scarcities of several foods and postwar increases in meat prices resulted in increased fish consumption for a large segment of the population and provided an opportunity for many people to become more accustomed to eating fish and fishery products. Recent studies in about 20 large inland cities have indicated that consumers prefer commercially frozen or packaged fish to locally caught fresh fish. Assuming an even flow of imports, with adequate conservation of the ocean and Great Lakes fishery resources, domestic stocks and the consumption of commercial fishery products can be maintained and perhaps increased.

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1/ Editor's Note: This study of the supply and distribution of fish has been made in order to furnish the basis for reasonably adequate estimates of fish consumption per person. Such estimates will be included in table 3 of each issue of the National Food Situation along with those for all other major food commodities. The study has been prepared by Harry Sherr, Bureau of Agricultural Economics, in cooperation with Edward A. Power, Richard A. Kahn, and other specialists of the Fish and Wildlife Service, U. S. Department of Interior, and the U. S. Tariff Commission.

2/ See glossary for explanation of terms.

3/ Production includes only the reported catch of fin fish and shellfish by domestic commercial fishermen. The civilian consumption estimates indicated in this study are lower than those previously used because the latter (a) include the catch of sports and game fish by individuals, and (b) were calculated on the basis of marketed weight 2/.

The detailed analysis of domestic supplies of fish during the period 1930 to 1947, and the distribution of these supplies into domestic and foreign trade channels are presented below.

## SUPPLIES

Supplies available for distribution during a given period of time consist of domestic production and imports for consumption during the period, and stocks. Each of these components merits separate discussion.

Production:

Production of fish and fishery products in the United States and Alaska has increased since 1930, the second year for which complete and adequate data on output were available (see table 6.) Several production declines have occurred since that time but they were relatively short lived and output recuperated fairly rapidly. Except for 1942, the annual catch of fishery products since 1934 has totaled at least 4 billion pounds (round basis 4/.) In 1941 the record catch of 5.1 billion pounds (round basis 4/ ) was established. During the war years, 1942-45, production was maintained at a relatively high level through the recruitment of persons not previously engaged in the fishery industry, longer hours of work and through the intensive use of available production facilities.

In general, fish production is seasonal--roughly from about April through November. Except for legal restrictions imposed by some States, weather conditions and the availability of fish are among the important factors which determine the length of the fishing season.

There are 7 major fish producing areas in the continental United States. Because of the nature of the local fishery resources each of these areas tends to specialize in a limited number of species of fish caught, and a limited number of forms in which the fish are marketed. These areas are:

(a) New England States -- Fresh and processed fish -- groundfish (cod, haddock, hake, pollock and cusk), rosefish, flounder, sardines (Atlantic sea herring), whiting, clams, lobsters and scallops.

(b) Middle Atlantic States -- Fresh fish -- butterfish, flounder, haddock, mackerel, scup, shad, sea trout, whiting, clams and oysters.

(c) Chesapeake Bay area -- Fresh fish -- croaker, scup, shad, sea trout, striped bass, crabs and oysters.

4/ See glossary for explanation of terms.

(d) South Atlantic States -- Fresh fish -- bullheads, catfish mullet, spot, Spanish mackerel, crabs, oysters and shrimp.

(e) Gulf States -- Fresh and processed fish -- crabs, oysters and shrimp.

(f) Great Lakes States -- Fresh fish -- carp, chubs, cisco, lake herring, lake trout, sheepshead, sucker mullet, whitefish, yellow perch and yellow pike.

(g) Pacific States 5/ -- Fresh and processed fish -- salmon, sardines (pilchards), mackerel, tuna, rockfish, flounder, halibut, lingcod, sablefish, smelt, crabs and oysters.

The major part of the fish caught in the United States and Alaska has been utilized as food, from 60 to 70 percent of the total catch. The amount destined for human consumption has been almost equally divided between canned fish, and fresh and frozen fish. The quantity of fish that has been utilized as cured fish has been declining slightly. During the 18 year period cured fish represented from about 2 to 3 percent of the total catch except from 1930 to 1933 when it ran slightly higher.

The over-all estimates on the quantity of fish utilized fresh and frozen, fail to reflect an important internal shift -- specifically the year to year increase in the quantity of fish frozen for human consumption (see table 7).

The quantity of the commercial catch of fish that is preserved by freezing is more pronounced than the data in table 7 indicate. The amount of frozen fish produced in recent years represents more fish (round basis 6/) than in the past because of the increasing quantity of fish fillets frozen. For some species the fillet represents as little as 25 to 30 percent of the weight of the unprocessed fish (round basis 6/).

The most important canned fish items produced in the continental United States are salmon, sardines (pilchards and Atlantic sea herring) and tuna. From 1930 to 1946 more sardines (pilchards) were canned than any other single species of fish. In 1947 the leading fish canned were tuna and tuna-like fish.

## Stocks

On an edible weight basis 6/, the quantity of fresh and frozen fish reported held in commercial cold storage facilities on January 1 each year has ranged from about 8 to 10 percent of the quantity of fresh and frozen

5/ Excluding Alaska.
6/ See glossary for an explanation of terms.

Table 6.- Commercial fishery products: Utilization of the United States and Alaska catch, 1930-47

(round weight basis)

| Year | Total catch | Utilization | | | |
|---|---|---|---|---|---|
| | | Fresh and frozen | Canned | Cured | Byproducts and bait 1/ |
| | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds |
| 1930 | 3,287 | 1,389 | 1,077 | 145 | 676 |
| 1931 | 2,657 | 1,121 | 962 | 130 | 444 |
| 1932 | 2,614 | 1,032 | 787 | 140 | 655 |
| 1933 | 2,933 | 1,012 | 991 | 135 | 795 |
| 1934 | 4,058 | 1,087 | 1,293 | 130 | 1,548 |
| 1935 | 4,066 | 1,250 | 1,220 | 130 | 1,466 |
| 1936 | 4,760 | 1,321 | 1,459 | 135 | 1,845 |
| 1937 | 4,353 | 1,339 | 1,356 | 130 | 1,528 |
| 1938 | 4,253 | 1,355 | 1,234 | 130 | 1,534 |
| 1939 | 4,443 | 1,366 | 1,281 | 130 | 1,666 |
| 1940 | 4,060 | 1,461 | 1,280 | 130 | 1,189 |
| 1941 | 5,080 | 1,660 | 1,645 | 125 | 1,650 |
| 1942 | 3,877 | 1,407 | 1,230 | 115 | 1,125 |
| 1943 | 4,202 | 1,495 | 1,165 | 114 | 1,428 |
| 1944 | 4,504 | 1,589 | 1,225 | 110 | 1,580 |
| 1945 | 4,570 | 1,841 | 1,230 | 110 | 1,389 |
| 1946 | 4,396 | 1,651 | 1,220 | 115 | 1,410 |
| 1947 2/ | 4,344 | 1,639 | 1,275 | 115 | 1,315 |

1/ Includes fish used as animal bait or processed into meal, oil and other non-food products. In addition, waste from fish canning, dressing, and filleting operations are also used in the manufacture of byproducts.

2/ Preliminary.

Data from Fish and Wildlife Service, Department of Interior.

Table 7.- Fish, frozen: Production in the United States and Alaska, 1930-47 (product weight 1/)

| Year | Quantity |
|---|---|
| | Million pounds |
| 1930 | 139.3 |
| 1931 | 112.3 |
| 1932 | 92.5 |
| 1933 | 95.9 |
| 1934 | 133.5 |
| 1935 | 149.6 |
| 1936 | 179.3 |
| 1937 | 168.2 |
| 1938 | 186.1 |
| 1939 | 183.4 |
| 1940 | 196.2 |
| 1941 | 246.6 |
| 1942 | 247.2 |
| 1943 | 246.1 |
| 1944 | 266.5 |
| 1945 | 286.1 |
| 1946 | 280.1 |
| 1947 | 246.6 |

1/ Weight as reported, includes fish and shellfish frozen in the form of round, dressed, drawn, steaks and fillets (see glossary for definitions). The statistics are not comparable with those on the utilization of the annual catch (Table 6) because they are on a different basis. The data also include fish frozen for use as bait and animal food. No information on the latter is available for the years prior to 1941, however, from that time on bait and animal food production, in millions of pounds, was 5.9 in 1941; 4.9 in 1942; 6.3 in 1943; 5.0 in 1944; 7.3 in 1945; 11.7 in 1946; 11.0 in 1947.

Compiled from data from Fish and Wildlife Service, Department of the Interior.

fish produced in the preceding calendar year (see table 9). The estimated January 1 cold-storage holdings in 1933 and 1934 were about 7 percent of the corresponding preceding year's output and the beginning stocks of 1947 and 1948 were 13 and 11.5 percent respectively. In view of the seasonally low production of fresh and frozen fish in the late fall and winter seasons, stocks at the end of the year tend to be the highest.

During the war period, cold storage space became increasingly difficult to obtain. Military agencies maintained large stocks of foods and other merchandise under refrigerated storage conditions thus limiting the space available for civilian use. As of September 2, 1944, War Food Order 111 placed a ceiling on the quantity of frozen packaged fish that could be held in commercial cold storage facilities. This regulation was terminated in 1946.

Adequate information on canned fish stocks is not available for any one of the 18 years covered in the analysis. The data shown in table 10 relate to stocks of canned salmon held by packers or their selling agents. Even though salmon represents the largest quantity of canned fish held at the packer level, these statistics reflect only a part of the canned fish stocks even for salmon. However, since 1942, carryover stocks at most distribution levels have been unusually small and their absence from the analysis has had very little, if any, effect on the adequacy of the estimates of civilian consumption of canned fish.

Data on cold-storage stocks of cured fish not subject to reprocessing first became available as of January 15, 1941 (see table 11). At the present they include smoked fish only. In view of the relatively small quantity of cured fish consumed in the continental United States, stocks maintained in commercial cold storage facilities have been relatively unimportant.

Imports

Receipts of fish from Alaska and foreign countries have been an important part of the corresponding annual supplies[7/] in continental United States (see table 8). From 1930 to 1939 imports and receipts from non-contiguous territories were from 30 to 40 percent of domestic supplies. Following the outbreak of World War II in Europe in 1939, imports from European countries were drastically reduced, and after 1941 imports from Asia virtually ceased. Since 1940 receipts from Alaska and other off-shore producing areas have ranged from 25 to 28 percent of continental United States supplies.

Canada and Newfoundland have always been the largest suppliers of fish to the United States. Since 1939 they have become more important. Trade with Iceland, a large supplier of cured fish, diminished during the war. However, since 1945, in addition to the cured product, this country has increased its shipments of frozen fish fillets. Japan was a principal source for frozen and canned tuna and canned crabmeat before the war, but since that time receipts of fish from Japan have been insignificant.

7/ Supplies equal production plus imports for consumption and net change in stocks.

Imports of fresh and frozen fish have been increasing since 1934 (see table 9). Prior to the war they were from 10 to 14 percent of the corresponding annual supplies of this country. From 1941 on, receipts of fresh and frozen fish from abroad increased each year until in 1945 they amounted to almost 16 percent and in both succeeding years were more than 16 percent of the domestic supplies in the corresponding period. The bulk of these imports is comprised of groundfish (cod, haddock, hake, pollock and cusk) and rosefish fillets from Canada, Newfoundland and Iceland.

Most of the imports (including receipts from non-contiguous territories) are canned fish products. During the period 1930-42 they accounted for about 70 percent of the total fish imports into the continental United States. From 1943 on they ranged from about 45 to 60 percent of total imports.

Canned salmon receipts from Alaska have always been significantly large. For most of the 18 year period they accounted for 75 to more than 86 percent of the total canned fish receipts in continental United States. During the period 1941 to 1945 canned salmon shipments to this country ranged from 93 to almost 97 percent.

Up until 1940 canned fish imports provided from 45 to 70 percent of our total canned fish supplies 8/ (see table 10). After that time receipts from off-shore sources ranged from 30 to 43 percent of total domestic supplies. Another indication of the significance of imports is the fact that prior to 1939, except for 1930 and 1935, receipts from abroad exceeded domestic production of canned fish; in 1932 imports were 2-1/2 times the quantity produced in this country. Since 1939, except for 1946 when the canned salmon output in Alaska was unusually low, imports ranged from 50 to 75 percent of domestic production.

Cured fish imports since 1930 have been a very important supplement to the domestic production of this commodity (see table 11). For the 18-year period, receipts from Alaska and foreign sources were nearly equal to the quantity produced in the continental United States.

From 1942 to 1947, the quantity of canned fish and salted codfish and related species imported into the United States from foreign producing areas was limited in accordance with the allocation recommendations of the Combined Food Board and the International Emergency Food Council of F.A.O. 9/ Under the provisions of War Food Order 72, in effect from August 1943 to October 1946, these recommendations were implemented and imports were prorated among domestic importers on the basis of the volume of business they conducted in the past years.

8/ Supplies equal production plus imports and net change in stocks.

9/ The Combined Food Board, comprised of representatives of the United States, Canada, and the United Kingdom, functioned as an agency which recommended allocations of, among other commodities, the exportable supplies of canned fish and salted codfish and related species of the major producing areas among various countries. In 1946 the Combined Food Board was replaced by the International Emergency Food Council of the Food and Agricultural Organization of UN, and the membership enlarged to include the participating countries of F.A.O. Allocation recommendations for canned fish were discontinued after March 31, 1947 and for salted fish after June 30, 1947.

## DISTRIBUTION

United States fish supplies are distributed through commercial trade channels to civilians and foreign markets, and Government channels to United States military agencies and consumers abroad. The effect of fish purchases by the military agencies, and exports and shipments to territories from domestic supplies on civilian consumption is discussed below.

### Fresh and Frozen Fish

The per capita consumption of fresh and frozen fish in the United States has risen from a low of 4.2 pounds (edible basis) in 1933 to 6.2 pounds in 1947 (see table 9). The upward trend in consumption is principally the result of the increased consumption of fresh and frozen fish fillets. Before the war, the consumption of fish was concentrated in the coastal areas of the United States. Within the past 10 years the quantity of fresh and frozen fish fillets consumed in the interior parts of the country has increased.

The development of fresh and frozen fish fillets, products which are very convenient for household and institutional use, plus improvements in packaging, transportation and local storage facilities did much to expand the domestic consumption of fish. The wartime shortage of canned fish and of many other foods stimulated consumer demand for fresh and frozen fish.

Purchases of fresh and frozen fish by United States military agencies increased rapidly after the United States entered World War II. In 1942 military purchases in market centers amounted to about 20 million pounds. They doubled in the year that followed and reached a peak of about 64 million pounds in 1944. Most of the fish was purchased for consumption by members of the armed forces stationed in the United States.

Fresh and frozen fish exports and shipments to non-contiguous territories have accounted for only a relatively small part of total fish supplies and they have declined since 1930. From 1936 to 1942 exports and shipments fell off each year.

### Canned Fish

The estimated per capita consumption of canned fish in the United States since 1930 has ranged from a high of 5.8 pounds in 1936 to a low of 1.9 pounds in 1942 (see table 10). The large wartime demands of United States military agencies and allied countries made heavy inroads on the domestic canned fish supplies, and severely limited the quantity available for civilians.

The unusually large wartime demand for canned fish, especially for salmon and sardines (both pilchards and Atlantic sea herring), made it necessary to control distribution. Administratively, this was effected through (a) Government set-aside orders which required producers to reserve a specific portion of their current canned fish output for Government agencies, (b) export licenses which permitted only the amount

allocated to foreign countries to be shipped out of the United States, and (c) the point rationing system which attempted to promote more equitable distribution of civilian supplies of canned fish. 10/

Salmon has been the most popular of the canned fish. It accounted for 50 percent or more of the canned fish consumed in the United States between 1930 and 1940. In 1936 civilian per capita consumption of salmon was almost 3.5 pounds, well over half of the total of all canned fish consumed, 5.8 pounds. From 1942 to 1945, because of large procurement by United States military agencies and the Department of Agriculture, civilian supplies of canned salmon were small relative to demand and consumption per capita declined to about 20 to 30 percent of the total canned fish eaten.

Purchases of canned fish by United States military agencies were increased after the outbreak of the war, from 150 million pounds in 1942 to almost 260 million pounds in 1945. (See table 10.) After the cessation of hostilities, military procurement dropped off considerably and in 1946 was at a minimum since there were large military stocks of canned fish to be used up. In 1947 after military stocks had been reduced, procurement again expanded, but to only a fraction of the rates reached during the war years.

Exports and shipments to territories of canned fish, especially of salmon and sardines (pilchards), have always been fairly sizeable. From 1932 to 1939, exports and shipments ranged from 10 to 16 percent of the total quantity of canned fish moving into distribution channels. After the outbreak of war in Europe, the quantities withdrawn from current market supplies for export under lend-lease to allied countries--principally the United Kingdom, her dependent overseas territories and the British military forces--increased steadily. At their peak, in 1944, they amounted to almost 50 percent of the amount available for distribution.

During and just after the war, most of the exports of food from the United States were handled through the Department of Agriculture. Large purchases of canned fish were made for lend-lease, the United States territories, UNRRA and other foreign aid programs. (See table 10.) After reaching a total of 181 million pounds in 1944, the Department's purchases declined. Since that time procurement has been reverting to domestic private trade organizations.

Cured Fish

Consumption of cured fish in the United States has for many years been relatively small. (See table 11.) Indicated domestic disappearance in 1930, 1.3 pounds per capita, was the highest during the 18-year period covered by this study. Since 1930 civilian consumption has ranged from 0.7 to 1.1 pounds per capita. The relatively low level of cured-fish consumption in this country can to some extent be explained by the fact

10/ A more detailed description of the various Government regulations is presented on page 29.

that Americans are not as dependent upon foods preserved by salting or smoking as are many of the citizens of other countries. Abundant supplies of varied foods such as meat, poultry, eggs, dairy products, and fresh and processed fruits and vegetables have been reflected in the general downward trend in the consumption of many food items that are staples in other countries.

Military procurement of cured fish throughout the war years, 1942 to 1945, was relatively small. In 1942 military agencies took about 4 percent of the quantity which was available for distribution; in 1945, about 10 percent.

Annual exports and shipments of cured fish from the United States from 1932 to 1942 ranged from 5 to 10 percent of total supplies. After 1939, when fishing operations of European countries were severely restricted as a result of the war, the United States was called upon to increase cured fish exports to allied nations. As a result of this demand, the 1943 and 1944 outward movement of cured fish from the United States accounted for 20 to 25 percent of the domestic cured fish supplies. In the subsequent years, exports and shipments again declined to the prewar volume and reverted to commercial trade channels.

## RETAIL PRICES

In general, prices of fish have tended to be low in comparison with meat, poultry, eggs and dairy products. After 1940, the price of fish began to rise rather sharply as did the price of many food items (see table 12).

Retail price data of the Bureau of Labor Statistics reflect increased consumer demand for fresh and frozen fish during the period 1939 to 1947 (see table 14). In 1940 the average monthly price was 107 percent of the base period average but by 1943 it had risen to 209. Maximum price ceilings first placed on some canned fishery products in 1942 and fresh and frozen fish in 1943, had some effect in slowing the upward trend in prices. The average monthly price index of fresh and frozen fish in 1944 was 210, only slightly higher than for the preceding year. Beginning with 1945 prices began to increase again but at a slower rate than in the period 1941 to 1943. By 1947, the monthly index averaged 243. Even though the annual price of fresh and frozen fish rose during the years 1940 to 1947, seasonal variations in price continued to occur each year.

The only canned fish for which the Bureau of Labor Statistics collected retail prices were pink and red salmon (see table 13). The average monthly price of pink salmon was 13.1 cents per pound and red salmon 23.6 cents in 1939. The retail price of these commodities has risen sharply since that time--especially after the termination of price controls in 1946. In 1947 the average monthly price of pink salmon was 42.4 cents per pound and, based on reports for the first half of the year, red salmon averaged 60.4 cents.

## GOVERNMENT REGULATIONS

During the war period, 1942 to 1945, various Federal Government regulations were enacted and enforced in order that a stable domestic economy could be maintained despite both the direct and indirect effect of the unusually heavy drain the war effort was making on the nation's resources. The regulations were amended in accordance with changing economic conditions. The following presentation attempts to review the more important regulations which applied to the fish production and distribution industry in the United States.

### Prices

In general under the various regulations the maximum selling prices of fresh and processed fish of producers, processors and distributors were defined in actual dollars and cents or determined by a fixed price mark-up over the net cost of the commodity to these various parties. In the case of the latter, to insure uniformity in the determination of ceiling prices, the regulations defined the term "net cost", stated how "net cost" was to be computed, and specified the mark-up that the fish producers, processors and distributors were to add to the computed net cost of the commodity that they handled. Only the mark-up was fixed, the selling price could fluctuate on the basis of valid changes in the cost of the commodity.

The price of certain fishery products at the producer and all distribution levels was controlled early in 1942 under the General Maximum Price Regulation issued by the Office of Price Administration. Where the results obtained under this and other regulations did not prove satisfactory, it was necessary to issue specific regulations in order to keep consumer prices at a relatively stable level and at the same time to insure fish producers, processors and distributors a fair and equitable price.

There were many price regulations and amendments issued during the war years. Only the major ones are presented below. In April 1943 the processors' and wholesalers' selling prices of frozen fish were established under Maximum Price Regulation 364. This was followed by MPR 418 in July 1943 which fixed producers' and wholesalers' selling prices on 48 species of fresh fish. In February 1945 the selling prices of specific species of fresh and frozen fish were revised and reissued under MPR 579; they were applicable to producers, processors, and distributors other than retailers. In July 1943 MPR 439 established maximum retail sales prices on fresh and frozen fish; this regulation was implemented in January 1944 by MPR 507. Prices of processed fish other than fresh and frozen fish and caviar were regulated along with other specified food items in July 1943 under MPR 421 for wholesalers, and both MPR 422 and 423 for retailers.

Canned fish originally were under the General Maximum Price Regulation; the regulation established ceiling prices for processors and distributors. As necessary, individual species were withdrawn from the general provisions of this regulation and covered by specific regulations.

Effective July 23, 1942 sardines (Atlantic sea herring) were placed under specific dollars and cents ceilings (MPR 184); in August sardines (pilchards) were placed under MPR 209.

In the last quarter of 1942 canned crabmeat, salmon and mackerel were covered under separate price regulations (MPR 247, 265 and 277, respectively). During the first quarter of the following year it was found necessary to include canned tuna, shrimp and oysters under individual regulations (MPR 299, 311, and 328, respectively).

Cured fish was also included under the General Maximum Price Regulation. For vinegar-cured herring and salt cured herring it was deemed desirable to issue specific price regulations. The former was covered under MPR 252 effective October 1942, and the latter under MPR 343 in March 1943.

In order to control domestic prices more effectively the Government placed fish under the Maximum Import Price Regulation. Under the provisions of this regulation, the importer, in computing "net cost" for the purpose of determining the maximum selling price, was limited to the same cost items used in computing costs in March 1942--special provisions were applicable to those individuals who were not fish importers on that date. To the computed net cost, the same dollars and cents mark-up used in March 1942 or 75 percent of the percentage mark-up was a dded in order to arrive at the ceiling price. This regulation was amended from time to time whenever current conditions were such that the continuation of the regulation would not be satisfactory to both consumers and importers.

The maximum price regulations were binding upon producers, processors and distributors. However, if evidence of general hardship to the industry was shown, the regulations were adjusted. For example, as of September 1945, it was found desirable to amend MPR 507 to exclude from its price control provisions 8 species of Canadian lake fish.

Other Government Regulations:

1. Production controls:

a. Materials Conservation:

Under the War Production Board order M-81 which became effective February 1942 an attempt was made to conserve steel and tin by entirely prohibiting certain packs of processed foods, limiting the volume of less essential packs, reducing the thickness of the tin coating on cans, and eliminating small cans entirely. Each food item was assigned a priority rating and the can manufacturers were obliged to supply the processors' orders on the basis of the rating assigned to each commodity.

Except for the minor species, there was no restrictions on the quantity of fish that could be preserved by canning. There were limitations on the number of can sizes that could be used for canning each species of fish, but the permissible sizes were those in which most of the fish had been packed in previous years. For most species the tin can requirements of fish processors were granted the highest priority ratings.

M-81 was reviewed periodically and the provisions were changed as required. By March 1947 the restrictions on the use of tin cans for fishery products were lifted. M-81 is still in force and is administered by the Department of Commerce.

b. Coordinated Pilchard Production Plan:

During the period June 1943 to the summer of 1946, because of the large wartime needs for canned sardines (pilchards), it was necessary for the Federal Government to regulate the utilization of this fish for food and both fish oil and meal. The Coordinator of Fisheries, under the provisions of the Department of Interior regulation "Title 50 Wildlife", had the responsibility of seeing that there was a sufficient quantity of canned sardines (pilchards) produced to meet all essential requirements.

In order to carry out the provisions of the regulation effectively, the Coordinator of Fisheries assigned ports of operation to each fishing vessel and then designated the cannery or pilchard reduction plant to which each vessel was required to sell its catch.

c. Salmon Canning Concentration Order:

During the years, 1943 to 1946, because of the shortage of manpower, fuel and vessels, it was necessary to concentrate in fewer plants the production of canned salmon in the United States and Alaska. This was accomplished under the authority granted by "Title 50 Wildlife". Manpower and other factors of production were pooled. The profits derived from the operation of the plants were shared among the various entrepreneurs in the joint venture.

d. Halibut Order:

In order to insure adequate distribution of the halibut catch during the war period, "Title 50 Wildlife" required that the landings be allocated among fish wholesalers on a pro-rata basis. The amount of business conducted in the past determined the allocation for each distributor. The order was operative from June 1944 to July 1946.

2. Distribution controls:

Unusually large demand for canned fish during the war years made it necessary for the Federal Government to allocate the commodities among the various non-civilian and civilian claimants. On the basis of the allocation the processors were required to reserve a specific portion of their production to fill the needs of United States military agencies and other essential claimants. This set-aside, mandatory under the provisions of War Production Board Order M-86, was established in May 1942.

The canned fish allocation covered a full fiscal year (July-June basis), but was reviewed every 3 months in view of revised supply and requirements information. The allocation provided the basis for making adjustments to the production set-aside orders.

The first set-aside order, M-86b, required that processors reserve for essential war claimants the entire output of canned salmon, sardines (pilchards and Atlantic sea herring) and mackerel packed during the fiscal year beginning March 1, 1942. This regulation was subsequently amended. In March 1943, M-86 was revoked and the responsibility for controlling the primary distribution of canned fish under this regulation was transferred to the Secretary of Agriculture. Food Distribution Order 23, issued by the Secretary on February 19, 1943 extended the provisions of M-86b and its amendments relating to canned fish. In April 1943, after the effective production period covered under both M-86 and FDO 23 had expired, War Food Order 44 was issued.

The first WFO 44 required that 55 percent of the 1943 pack of salmon, sardines (pilchards and Atlantic sea herring), mackeral and shrimp, and 60 percent of the tuna pack be reserved for United States military agencies and other essential wartime claimants. In the course of events, it was found that the canned tuna and shrimp requirements of the essential claimants could be adequately supplied from the open market, and the set-aside provisions were revoked effective June 28, 1943 in the case of the former and March 31, 1944 in the case of the latter. For the other species of canned fish, the set-aside provisions under WFO 44 continued in force. During 1945 when the reservation requirements under this regulation were greatest, the annual pack reservation was 80 percent for salmon, sardines (pilchards and Atlantic sea herring) and mackerel.

After the end of World War II because of reduced requirements the canned fish set-asides were cut sharply. On April 1, 1946 the production reservation provision of WFO-44 was revoked for mackerel and sardines (Atlantic sea herring)--at that time the set-aside was 45 percent of the pack. About a year later, in March 1947, the reservation order was terminated for salmon and sardines (pilchards); by that time the set-asides had been reduced to 33 percent and 45 percent, respectively.

The quantity of canned fish not reserved for essential claimants was available to domestic consumers and non-essential export claimants. The quantity which each received was based on the Federal Government allocation; exports to non-essential claimants were controlled under an export permit system.

Canned fish available to domestic consumers was distributed under the point-rationing system in order to insure equitable distribution. Rationing under this system became effective March 29, 1943 and remained in force until August 15, 1945.

## STATISTICAL METHODOLOGY

The statistical data used in this study were obtained from various sources:

(a) Production statistics and data on stocks other than for canned fish were obtained from the reports of the Fish and Wildlife Service. The canned fish production statistics exclude products containing small quantities of fish.

(b) Canned salmon stocks were obtained from the annual issue of the "Pacific Fisherman".

(c) Imports, shipments (from Alaska, Hawaii, Puerto Rico and Virgin Islands) to the United States, commercial exports and commercial shipments from the United States to territories (Alaska, Hawaii, Puerto Rico and Virgin Islands) were obtained from the "Foreign Commerce and Navigation of the United States" reports of the U. S. Department of Commerce. The data exclude species that are processed in the United States before sale to the ultimate consumer.

(d) Data relating to the Department of Agriculture transactions--i.e. stocks and deliveries for export or shipments to non-contiguous territories of the United States--were obtained from reports of the Department. Net purchases for exports were derived from stock and delivery information.

(e) Net military purchase information was obtained from reports of the National Defense agency, and took into account transfers of fish to non-military agencies.

(f) Civilian consumption is a residual figure, obtained after subtracting from total supplies: the year-end stocks, commercial exports and shipments, and the procurement by non-civilian agencies.

The data on supplies and distribution were converted to an "edible weight" basis using factors developed over a period of years by specialists of the Fish and Wildlife Service and the United States Tariff Commission. In general, for the purpose of converting the production estimates to an "edible weight" basis:

(a) canned, cured and also fresh and frozen packaged fin fish were assumed to be 100 percent edible;

(b) fresh and frozen unpackaged fin fish were assumed to contain no more than 50 percent edible portion; and

(c) among the shellfish, the mollusks catch was assumed to be 100 percent edible because the data are reported on a "meat equivalent" basis, and the crustaceans were converted based on the average meat yield for each species.

For many individual species of fresh or processed fish separate conversion factors were used depending on both the basis on which production statistics are reported and yield factors obtained both from laboratory tests and from fish processors' experience.

## GLOSSARY OF TERMS

Fish include (a) fin fish

(b) mollusks--i.e., clams, oysters, scallops, etc.

(c) crustaceans--i.e., crabs, lobsters, shrimp, etc.

Round weight, except for mollusks, is the weight of the fish as landed. Catch statistics for mollusks are on a "meat" basis.

Drawn weight is the weight of the fin fish after the entrails have been removed.

Dressed weight is the weight of the fin fish after the entrails, head, tail and fins have been removed.

Edible weight is the weight of the edible portion of the fin fish, mollusk or crustacean.

Fillets are the meaty sides of the fin fish which have been cut lengthwise away from the backbone.

Steaks are cross-section cuts of larger species of fish, usually 5/8 inch or more thick.

Marketed weight is the weight of the fish in the form in which it was marketed--i.e., round, drawn, dressed, etc.

Commercial fish production refers to the quantity of fish reported as caught by commercial fishermen.

Table 8.- Commercial fish, total fresh and processed: Supply and distribution, 1930-47

(edible weight)

| Year | Supply | | | | | Distribution | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | | Department of Agriculture | | | | Domestic disappearance | |
| | Production | Beginning com'l stocks 1/ | Imports 2/ | Total Supply | Ending com'l. stocks 1/ | Com'l exports and shipments 3/ | Beginning stocks | Ending stocks | Deliveries | Net purchases for export | Military | Civilian | Civilian per capita |
| | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Pounds |
| 1930 | 1,046.8 | 137.3 | 439.6 | 1,623.7 | 151.4 | 168.4 | | | | | | 1,303.9 | 10.5 |
| 1931 | 831.6 | 151.4 | 465.6 | 1,448.6 | 186.4 | 114.6 | | | | | | 1,147.6 | 9.2 |
| 1932 | 702.6 | 186.4 | 458.9 | 1,347.9 | 154.7 | 89.9 | | | | | | 1,103.3 | 8.9 |
| 1933 | 779.0 | 154.7 | 459.4 | 1,393.1 | 167.3 | 82.2 | | | | | | 1,143.6 | 9.0 |
| 1934 | 870.1 | 167.3 | 529.7 | 1,567.1 | 237.9 | 116.9 | | | | | | 1,212.3 | 9.5 |
| 1935 | 1,024.8 | 237.9 | 454.0 | 1,716.7 | 196.1 | 121.7 | | | | | | 1,398.9 | 11.0 |
| 1936 | 1,005.1 | 196.1 | 635.6 | 1,836.8 | 173.2 | 112.5 | | | | | | 1,551.1 | 12.0 |
| 1937 | 1,054.2 | 173.2 | 545.2 | 1,772.6 | 247.3 | 122.6 | | | | | | 1,402.7 | 10.7 |
| 1938 | 972.8 | 247.3 | 539.2 | 1,759.3 | 190.1 | 117.3 | | | | | | 1,451.9 | 11.1 |
| 1939 | 1,073.3 | 190.1 | 461.6 | 1,725.0 | 161.5 | 127.0 | | | | | | 1,436.5 | 10.9 |
| Average 1935-39 | 1,026.0 | 209.0 | 527.1 | 1,762.1 | 193.6 | 120.3 | | | | | | 1,448.2 | 11.1 |
| 1940 | 1,114.3 | 161.5 | 416.1 | 1,691.9 | 114.0 | 150.2 | | | | | | 1,427.7 | 10.8 |
| 1941 | 1,298.7 | 114.0 | 494.3 | 1,907.0 | 109.6 | 116.2 | | | 105.8 | 105.8 | | 1,575.4 | 11.8 |
| 1942 | 1,072.2 | 109.6 | 394.9 | 1,576.7 | 61.2 | 37.6 | | 53.9 | 160.5 | 214.4 | 4/174.0 | 1,089.5 | 8.3 |
| 1943 | 1,086.1 | 61.2 | 412.9 | 1,560.2 | 57.0 | 15.3 | 53.9 | 87.0 | 276.8 | 309.9 | 116.9 | 1,061.1 | 8.2 |
| 1944 | 5/1,154.8 | 57.0 | 422.0 | 1,633.8 | 67.6 | 21.1 | 87.0 | 150.9 | 143.3 | 207.2 | 187.7 | 1,150.2 | 8.9 |
| 1945 | 5/1,325.9 | 67.6 | 466.0 | 1,859.5 | 90.3 | 28.8 | 150.9 | 6/ 88.1 | 110.5 | 47.7 | 326.8 | 1,365.9 | 10.6 |
| 1946 | 5/1,285.8 | 90.3 | 437.6 | 1,813.7 | 99.8 | 71.5 | 6/88.1 | 28.9 | 6/133.3 | 74.1 | 31.2 | 1,537.1 | 11.1 |
| 1947 | 5/1,300.4 | 99.8 | 454.9 | 1,855.1 | 87.7 | 130.9 | 28.9 | 3.2 | 89.0 | 63.3 | 25.1 | 1,548.1 | 10.8 |

1/ Includes cold storage stocks of fresh and frozen fish, canned salmon stocks (packer or primary distributor level) up to but not including 1942, and coldstorage stocks of cured fish (intermediate products excepted) beginning 1939. Ending 1945, data exclude cold storage stocks reported as held on United States Government account. 2/ Includes shipments from the non-contiguous territories to the continental United States, but excludes imports through the territorial customs districts. 3/ Excludes exports through the non-contiguous territories of the United States. 4/ Estimated. 5/ Preliminary. 6/ Includes about 700 thousand pounds of canned fish transferred to UNRRA by United States military agencies.

Table 9.- Commercial fish, fresh and frozen: Supply and distribution, 1930-47

(edible weight)

| Year | Supply | | | | Distribution | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | Department of Agriculture | | | | Domestic disappearance | | |
| | Production | Beginning com'l stocks 1/ | Imports 2/ | Total Supply | Ending com'l stocks 1/ | Com'l exports and shipments 3/ | Beginning stocks | Ending stocks | Deliveries | Net purchases for export | Military | Civilian | Civilian per capita |
| | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Pounds |
| 1930 | 661.9 | 53.4 | 73.1 | 788.4 | 52.5 | 8.5 | | | | | | 727.4 | 5.9 |
| 1931 | 546.7 | 52.5 | 72.6 | 671.8 | 43.9 | 8.2 | | | | | | 619.7 | 5.0 |
| 1932 | 489.4 | 43.9 | 55.2 | 588.5 | 32.4 | 7.2 | | | | | | 548.9 | 4.4 |
| 1933 | 481.9 | 32.4 | 62.3 | 576.6 | 33.6 | 8.4 | | | | | | 534.6 | 4.2 |
| 1934 | 514.5 | 33.6 | 62.7 | 610.8 | 45.9 | 8.8 | | | | | | 556.1 | 4.4 |
| 1935 | 593.6 | 45.9 | 76.3 | 715.8 | 47.3 | 7.4 | | | | | | 661.1 | 5.2 |
| 1936 | 608.8 | 47.3 | 89.5 | 756.6 | 63.5 | 7.8 | | | | | | 674.3 | 5.2 |
| 1937 | 628.1 | 63.5 | 99.5 | 791.1 | 53.4 | 7.6 | | | | | | 730.1 | 5.6 |
| 1938 | 622.5 | 53.4 | 84.5 | 760.4 | 57.2 | 6.9 | | | | | | 696.3 | 5.3 |
| 1939 | 624.3 | 57.2 | 96.0 | 777.5 | 58.7 | 5.6 | | | | | | 713.2 | 5.4 |
| Average 1935-39 | 615.4 | 53.5 | 89.2 | 758.1 | 56.0 | 7.1 | | | | | | 695.0 | 5.3 |
| 1940 | 673.5 | 58.7 | 96.0 | 828.2 | 62.6 | 3.3 | | | | | | 762.3 | 5.7 |
| 1941 | 757.2 | 62.6 | 92.3 | 912.1 | 70.8 | 3.1 | | | | | | 838.2 | 6.3 |
| 1942 | 625.5 | 70.8 | 86.2 | 782.5 | 60.7 | 2.1 | | | | | 4/ 20.0 | 699.7 | 5.3 |
| 1943 | 678.0 | 60.7 | 98.0 | 836.7 | 56.6 | 2.7 | | | | | 54.7 | 722.7 | 5.6 |
| 1944 | 691.8 | 56.6 | 110.2 | 858.6 | 66.7 | 4.3 | | | | | 63.7 | 723.9 | 5.6 |
| 1945 | 5/847.0 | 66.7 | 151.8 | 1,065.5 | 88.6 | 4.1 | | | | | 54.4 | 918.4 | 7.1 |
| 1946 | 5/759.0 | 88.6 | 150.5 | 998.1 | 97.6 | 4.3 | | | | | 25.8 | 870.4 | 6.3 |
| 1947 | 5/754.0 | 97.6 | 147.4 | 999.0 | 86.0 | 4.6 | | | | | 14.8 | 893.6 | 6.2 |

1/ Cold storage stocks maintained in continental United States. Estimated January 1 basis for years 1930 to 1942; actual January 1 basis beginning with 1943. As of the end of 1945, stocks exclude quantities reported held for Government agencies. 2/ Includes shipments from the non-contiguous territories to the continental United States, but excludes imports through the territorial customs districts. 3/ Excludes exports through the non-contiguous territories of the United States. 4/ Estimated. 5/ Preliminary.

territories of the United States. 4/ Estimated. 5/ Preliminary.

Table 10.- Commercial fish, canned 1/ : Supply and distribution, 1930-47

(edible weight)

| Year | Supply | | | | Distribution | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | | Department of Agriculture | | | | Domestic disappearance | |
| | Production | Beginning com'l stocks 2/ | Imports 3/ | Total Supply | Ending com'l stocks 2/ | Com'l exports and shipments 4/ | Beginning stocks | Ending stocks | Deliveries | Net purchases for export | Military | Civilian | Civilian per capita |
| | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Pounds |
| 1930 | 295.0 | 83.9 | 278.7 | 657.6 | 98.9 | 144.4 | | | | | | 414.3 | 3.3 |
| 1931 | 215.6 | 98.9 | 314.8 | 629.3 | 142.5 | 89.3 | | | | | | 397.5 | 3.2 |
| 1932 | 136.2 | 142.5 | 333.2 | 611.9 | 122.3 | 68.7 | | | | | | 420.9 | 3.4 |
| 1933 | 233.1 | 122.3 | 333.5 | 688.9 | 133.7 | 63.3 | | | | | | 491.9 | 3.9 |
| 1934 | 285.8 | 133.7 | 409.8 | 829.3 | 192.0 | 98.8 | | | | | | 538.5 | 4.2 |
| 1935 | 354.2 | 192.0 | 308.0 | 854.2 | 148.8 | 104.4 | | | | | | 601.1 | 4.7 |
| 1936 | 324.9 | 148.8 | 477.9 | 951.6 | 109.7 | 95.0 | | | | | | 746.9 | 5.8 |
| 1937 | 351.4 | 109.7 | 388.0 | 849.1 | 193.9 | 104.5 | | | | | | 550.7 | 4.2 |
| 1938 | 277.1 | 193.9 | 395.5 | 866.5 | 132.9 | 102.7 | | | | | | 630.9 | 4.8 |
| 1939 | 375.9 | 132.9 | 314.2 | 823.0 | 102.8 | 112.4 | | | | | | 607.8 | 4.6 |
| Average 1935-39 | 336.7 | 155.5 | 376.7 | 868.9 | 137.6 | 103.8 | | | | | | 627.5 | 4.8 |
| 1940 | 369.6 | 102.8 | 270.3 | 742.7 | 51.1 | 140.3 | | | | | | 551.3 | 4.2 |
| 1941 | 470.2 | 51.1 | 354.3 | 875.6 | 38.1 | 104.6 | | | 105.8 | 105.8 | | 627.1 | 4.7 |
| 1942 | 383.5 | 38.1 | 259.7 | 681.3 | 5/ | 30.2 | | 53.6 | 157.3 | 210.9 | 6/150.0 | 290.2 | 2.2 |
| 1943 | 345.4 | 5/ | 255.5 | 600.9 | 5/ | 8.6 | 53.6 | 85.0 | 257.0 | 288.4 | 62.2 | 241.7 | 1.9 |
| 1944 | 402.5 | 5/ | 247.5 | 650.0 | 5/ | 13.3 | 85.0 | 147.4 | 118.6 | 181.0 | 123.5 | 332.2 | 2.6 |
| 1945 | 7/418.4 | 5/ | 240.6 | 659.0 | 5/ | 20.7 | 147.4 | 8/87.9 | 103.8 | 9/44.3 | 259.5 | 334.5 | 2.6 |
| 1946 | 7/463.6 | 5/ | 200.3 | 663.9 | 5/ | 58.6 | 8/87.9 | 28.9 | 133.0 | 74.0 | 5.1 | 526.2 | 3.8 |
| 1947 | 7/483.2 | 5/ | 253.6 | 736.8 | 5/ | 119.2 | 28.9 | 3.2 | 89.0 | 63.3 | 10.3 | 544.0 | 3.8 |

1/ Excludes canned food products containing small quantities of fish or shellfish, for example, clam chowder, clam broth, and cod fish cake material. 2/ Canned salmon stocks held at the packer or primary distributor level. Stocks reporting was discontinued after the beginning of 1942. 3/ Includes shipments from the non-contiguous territories to the continental United States, but excludes imports through the territorical customs districts. 4/ Excludes exports through the non-contiguous territories of the United States. 5/ Not available. 6/ Estimated. 7/ Preliminary. 8/ Includes transfers of about 700 thousand pounds to UNRRA by United States military agencies. 9/ Excludes about 700 thousand pounds transferred to UNRRA by United States military agencies.



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Table 11.- Commercial fish, cured 1/ : Supply and distribution 1930-47

(edible weight)

| Year | Supply: Production | Supply: Beginning com'l stocks 2/ | Supply: Imports 3/ | Supply: Total Supply | Supply: Ending com'l stocks 2/ | Distribution: Com'l exports and shipments 3/ | Distribution: Department of Agriculture: Beginning stocks | Distribution: Department of Agriculture: Ending stocks | Distribution: Department of Agriculture: Deliveries | Distribution: Department of Agriculture: Net purchases for export | Distribution: Domestic disappearance: Military | Distribution: Domestic disappearance: Civilian | Distribution: Domestic disappearance: Civilian per capita |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Pounds |
| 1930 | 89.9 | | 87.8 | 177.7 | | 15.5 | | | | | | 162.2 | 1.3 |
| 1931 | 69.3 | | 78.2 | 147.5 | | 17.1 | | | | | | 130.4 | 1.0 |
| 1932 | 5/ 77.0 | | 70.5 | 147.5 | | 14.0 | | | | | | 133.5 | 1.1 |
| 1933 | 64.0 | | 63.6 | 127.6 | | 10.5 | | | | | | 117.1 | .9 |
| 1934 | 69.8 | | 57.2 | 127.0 | | 9.3 | | | | | | 117.7 | .9 |
| 1935 | 77.0 | | 69.7 | 146.7 | | 9.9 | | | | | | 136.8 | 1.1 |
| 1936 | 71.4 | | 68.2 | 139.6 | | 9.7 | | | | | | 129.9 | 1.0 |
| 1937 | 74.7 | | 57.7 | 132.4 | | 10.5 | | | | | | 121.9 | .9 |
| 1938 | 73.2 | | 59.2 | 132.4 | | 7.7 | | | | | | 124.7 | 1.0 |
| 1939 | 73.1 | | 51.4 | 124.5 | | 9.0 | | | | | | 115.5 | .9 |
| Average 1935-39 | 73.9 | | 61.2 | 135.1 | | 9.4 | | | | | | 125.7 | 1.0 |
| 1940 | 71.2 | | 49.8 | 121.0 | 4/ .3 | 6.6 | | | | | | 114.1 | .9 |
| 1941 | 71.3 | 4/ .3 | 47.7 | 119.3 | .7 | 8.5 | | | | | | 110.1 | .8 |
| 1942 | 63.2 | .7 | 49.0 | 112.9 | .5 | 5.3 | | 0.3 | 3.2 | 3.5 | 4.0 | 99.6 | .8 |
| 1943 | 62.7 | .5 | 59.4 | 122.6 | .4 | 4.0 | 0.3 | 2.0 | 19.8 | 21.5 | 0 | 96.7 | .7 |
| 1944 | 60.5 | .4 | 64.3 | 125.2 | .9 | 3.5 | 2.0 | 3.5 | 24.7 | 26.2 | 0.5 | 94.1 | .7 |
| 1945 | 5/ 60.5 | .9 | 73.6 | 135.0 | 1.7 | 4.0 | 3.5 | 0.2 | 6.7 | 3.4 | 12.9 | 113.0 | .9 |
| 1946 | 5/ 63.2 | 1.7 | 86.8 | 151.7 | 2.2 | 8.6 | 0.2 | 0 | 0.3 | 0.1 | 0.3 | 140.5 | 1.0 |
| 1947 | 5/ 63.2 | 2.2 | 53.9 | 119.3 | 1.7 | 7.1 | 0 | 0 | 0 | 0 | 0 | 110.5 | .8 |

1/ Excludes intermediate products which may be shown in its final stage of processing in this table or the canned fish table. Cured fish classified as "intermediate products" include green salted: cod, haddock, hake, pollock and cusk; mild cured salmon. 2/ Smoked fish only; data not available prior to January 15, 1941. 3/ Includes shipments from the non-contiguous territories to the continental United States, but excludes imports through the territorial customs districts. 4/ Stocks as of January 15, 1941. 5/ Preliminary.

Table 12.- Index numbers of average monthly retail prices of specified foods in leading cities 1/ in the United States, 1935-47

(1935-39 average = 100)

| Year | Fresh and frozen fish | Meats | Dairy products | Eggs |
|---|---|---|---|---|
| 1939 | 99.8 | 96.6 | 95.9 | 91.0 |
| 1940 | 106.7 | 94.4 | 101.4 | 93.8 |
| 1941 | 119.2 | 106.5 | 112.0 | 112.2 |
| 1942 | 160.0 | 122.5 | 125.4 | 136.5 |
| 1943 | 209.0 | 124.2 | 134.6 | 161.9 |
| 1944 | 209.6 | 117.9 | 133.6 | 153.0 |
| 1945 | 220.4 | 118.0 | 133.9 | 164.4 |
| 1946 | 240.6 | 150.8 | 165.1 | 168.8 |
| 1947 | 243.4 | 214.7 | 186.2 | 200.8 |

1/ 51 cities covered prior to February 1943, 56 cities thereafter.

Data from Bureau of Labor Statistics, Department of Labor.

Table 13.- Salmon, canned: Average monthly retail price in leading cities 1/ in the United States, 1939-47

| Year | Red salmon | Pink salmon |
|---|---|---|
| | Cents | Cents |
| 1939 | 23.6 | 13.1 |
| 1940 | 25.7 | 15.6 |
| 1941 | 30.4 | 17.9 |
| 1942 | 39.8 | 21.6 |
| 1943 | 41.3 | 23.5 |
| 1944 | 42.0 | 23.5 |
| 1945 | 40.4 | 23.3 |
| 1946 | 2/ 44.0 | 2/ 25.3 |
| 1947 | 3/ | 42.4 |

1/ 51 cities covered prior to February 1943; 56 cities thereafter.
2/ 11 month average price.
3/ June was the last month in 1947 for which retail price information was collected. The 6 month average is 60.4 cents per pound.

Data from Bureau of Labor Statistics, Department of Labor.

Table 14.- Fresh and Frozen Fish: Index numbers of average retail price per pound in leading Cities[1/] in the United States, 1939-47

(1938-39 average = 100)

| Year | January | February | March | April | May | June | July | August | September | October | November | December | Average |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1939 | 102.8 | 102.7 | 103.2 | 99.2 | 95.0 | 96.3 | 94.6 | 98.8 | 100.6 | 100.4 | 102.5 | 102.0 | 99.8 |
| 1940 | 106.2 | 103.9 | 105.6 | 112.4 | 106.0 | 106.0 | 103.0 | 104.7 | 106.6 | 106.7 | 108.4 | 110.9 | 106.7 |
| 1941 | 116.6 | 114.8 | 116.5 | 116.6 | 112.2 | 113.4 | 114.7 | 118.5 | 121.9 | 123.4 | 129.1 | 132.6 | 119.2 |
| 1942 | 140.2 | 155.1 | 155.2 | 152.2 | 144.0 | 153.9 | 157.5 | 161.8 | 166.3 | 171.9 | 177.6 | 183.8 | 160.0 |
| 1943 | 189.9 | 193.8 | 206.4 | 209.4 | 201.8 | 202.3 | 210.8 | 203.5 | 210.8 | 220.1 | 228.5 | 230.3 | 209.0 |
| 1944 | 229.1 | 220.7 | 224.4 | 213.0 | 201.2 | 196.8 | 197.7 | 198.2 | 201.0 | 207.4 | 212.6 | 213.5 | 209.6 |
| 1945 | 212.4 | 218.4 | 217.4 | 214.5 | 222.3 | 218.7 | 220.7 | 221.3 | 223.7 | 225.3 | 224.8 | 225.9 | 220.4 |
| 1946 | 232.4 | 231.7 | 232.4 | 224.3 | 220.7 | 222.9 | 240.9 | 243.6 | 247.9 | 263.2 | 264.7 | 262.9 | 240.6 |
| 1947 | 262.6 | 242.1 | 248.2 | 237.6 | 227.4 | 225.1 | 231.5 | 231.8 | 242.7 | 248.8 | 262.3 | 260.7 | 243.4 |

1/ 51 cities covered prior to February 1943; 56 cities thereafter.
Data from Bureau of Labor Statistics, Department of Labor.

Table 15.-Production of major food commodities, calendar years, 1935-39 average, 1945, 1946, 1947 and preliminary estimate for 1948 with percentage comparison 1/

| Commodity | Unit | Average 1935-39 | 1945 | 1946 | 1947 | Preliminary estimate for 1948 | 1948 as a percentage of 1935-39 | 1948 as a percentage of 1947 |
|---|---|---|---|---|---|---|---|---|
| Meats (dr. wt.) | | | | | | | | |
| Beef | Mil.lb | 6,937 | 10,275 | 9,373 | 10,429 | 9,300 | 134 | 89 |
| Veal | " " | 1,038 | 1,661 | 1,440 | 1,599 | 1,500 | 145 | 94 |
| Lamb and mutton | " " | 870 | 1,054 | 970 | 802 | 700 | 80 | 87 |
| Pork (excluding lard) | " " | 7,337 | 10,697 | 11,173 | 10,605 | 9,800 | 134 | 92 |
| Total meats | " " | 16,182 | 23,687 | 22,956 | 23,435 | 21,300 | 132 | 91 |
| Fish (edible weight) | | | | | | | | |
| Fresh and frozen | " " | 695 | 918 | 870 | 894 | 2/ | - | - |
| Canned 3/ | " " | 627 | 335 | 526 | 544 | 2/ | - | - |
| Cured | " " | 126 | 113 | 141 | 110 | 2/ | - | - |
| Total fish | " " | 1,448 | 1,366 | 1,537 | 1,548 | 2/ | - | - |
| Poultry and eggs | | | | | | | | |
| Eggs | Mil.doz | 3,335 | 5,120 | 5,098 | 5,069 | 4,900 | 147 | 97 |
| Chicken (dr. wt.) | Mil.lb | 2,327 | 4,170 | 3,597 | 3,458 | 3,300 | 142 | 95 |
| Turkey (dr. wt.) | " " | 350 | 673 | 687 | 608 | 460 | 131 | 76 |
| Dairy products | | | | | | | | |
| Total milk 4/ | " " | 103,656 | 120,995 | 119,284 | 118,964 | 117,026 | 113 | 98 |
| Cheese 5/ | " " | 669 | 1,117 | 1,101 | 1,206 | 1,110 | 166 | 92 |
| Cond. and evap. milk | " " | 2,225 | 4,124 | 3,346 | 3,508 | 3,560 | 160 | 101 |
| Fluid milk and cream 6/ | " " | 44,146 | 57,671 | 59,318 | 57,295 | 57,900 | 131 | 101 |
| Fats and oils | | | | | | | | |
| Butter, farm & factory (actual weight) | " " | 2,170 | 1,701 | 1,505 | 1,638 | 1,535 | 71 | 94 |
| Lard 7/ | " " | 1,624 | 2,010 | 2,114 | 2,316 | 2,080 | 128 | 90 |
| Margarine (fat content) | " " | 303 | 499 | 465 | 606 | 710 | 234 | 117 |
| Shortening | " " | 1,529 | 1,441 | 1,451 | 1,376 | 1,380 | 90 | 100 |
| Other edible fats and oils 8/ | " " | 575 | 966 | 683 | 1,075 | 970 | 169 | 90 |
| Total fats and oils 9/ | " " | 6,201 | 6,617 | 6,218 | 7,011 | 6,675 | 108 | 95 |
| Fruits | | | | | | | | |
| Fresh: | | | | | | | | |
| Citrus | " " | 6,875 | 9,931 | 9,296 | 9,992 | 9,000 | 131 | 90 |
| Apples (commercial) | " " | 4,385 | 2,415 | 3,936 | 3,937 | 3,600 | 82 | 91 |
| Other (excl. melons) | " " | 4,703 | 5,298 | 5,570 | 5,536 | 5,000 | 106 | 90 |
| Processed: | | | | | | | | |
| Canned fruit | " " | 1,705 | 1,905 | 3,083 | 2,677 | 2,600 | 152 | 97 |
| Canned fruit juices | " " | 345 | 1,822 | 2,292 | 2,016 | 2,361 | 684 | 117 |
| Frozen | " " | 106 | 447 | 523 | 352 | 400 | 377 | 114 |
| Dried | " " | 1,118 | 1,019 | 1,014 | 1,197 | 1,174 | 105 | 98 |

- Continued

Table 15.-Production of major food commodities, calendar years, 1935-39 average, 1945, 1946, 1947 and preliminary estimate for 1948 with percentage comparison 1/ - Continued

| Commodity | Unit | Average 1935-39 | 1945 | 1946 | 1947 | Preliminary estimate for 1948 | 1948 as a percentage of 1935-39 | 1948 as a percentage of 1947 |
|---|---|---|---|---|---|---|---|---|
| Vegetables | | | | | | | | |
| Fresh 10/ | Mil.lb | 30,520 | 35,607 | 38,946 | 35,848 | 36,602 | 120 | 102 |
| Canned 11/ | " " | 4,084 | 6,551 | 7,637 | 6,025 | 5,453 | 134 | 91 |
| Frozen | " " | 12/ 78 | 308 | 450 | 345 | 361 | 463 | 105 |
| Potatoes | Mil.bu. | 356 | 419 | 484 | 384 | 392 | 110 | 102 |
| Sweetpotatoes | " " | 68 | 65 | 66 | 57 | 50 | 74 | 88 |
| Dry edible beans 13/ | Mil.lb | 1,360 | 1,195 | 1,474 | 1,599 | 1,696 | 125 | 106 |
| Canned baby foods | " " | 48 | 422 | 462 | 353 | 450 | 938 | 127 |
| Sugar, raw basis | 1,000 sh.tons | 1,948 | 1,667 | 1,900 | 2,159 | 1,900 | 98 | 88 |
| Grains | | | | | | | | |
| Wheat | Mil.bu | 759 | 1,108 | 1,153 | 1,365 | 1,242 | 164 | 91 |
| Rye | Mil.bu | 44.9 | 24.0 | 18.9 | 26.0 | 26.7 | 59 | 103 |
| Rice, milled | Mil.lbs | 1,340 | 2,045 | 2,044 | 2,207 | 2,405 | 179 | 109 |
| Corn, grain only | Mil.bu | 2,050 | 2,594 | 2,990 | 2,153 | 3,000 | 146 | 139 |
| Oats | " " | 1,045 | 1,536 | 1,498 | 1,216 | 1,426 | 136 | 117 |
| Barley | " " | 239 | 267 | 262 | 279 | 307 | 128 | 110 |
| Peanuts | Mil.lb | 1,229 | 2,042 | 2,038 | 2,252 | 2/ | - | - |

1/ Calendar year basis except for fresh citrus fruit for which the season begins in the fall of the previous year; dried fruits which are on a pack-year basis; rice on a marketing year. 2/ Not available. 3/ Excludes canned food products containing small quantities of fish such as Clam chowder, etc. 4/ The production of total milk for human consumption given here differs from total farm production of milk in that the former excludes milk fed to calves but includes off-farm production while the latter excludes off-farm production but includes milk fed to calves. Milk fed calves and milk produced off farms are usually at approximately equal volume. 5/ Excluding full skim, cottage, pot, and bakers' cheese. 6/ Fluid milk equivalent for fresh use. 7/ Excluding amount used in manufactured products. 8/ Represents fats used in cooking and salad oils, salad dressing mayonnaise, bakery products and other minor uses such as fish canning. 9/ Fat content basis except for butter which is on an actual weight basis. 10/ Estimates of all vegetables and melons other than potatoes and sweetpotatoes include reported commercial production for fresh market shipments plus rough estimates of quantities produced in market gardens for fresh sale and sale and farm gardens for home use. Excludes town garden production. 11/ Includes asparagus, beans (lima), beans (snap), beets, carrots, corn, hominy, kraut (including bulk), peas, pickles (including bulk), pimientos, Irish potatoes, sweetpotatoes, pumpkin and squash, tomatoes, tomato pulp, and tomato juice, tomato sauce, paste, and catsup and chili sauce, mixed vegetables. 12/ Average 1937-39. Data prior to 1937 are not available. 13/ Cleaned basis.

Table 16.-Retail food prices and total consumer price index, United States 1940-46 and 1947-48 by months (Index numbers 1935-39 = 100)

| Year and month | Meats 1/ | Eggs | Dairy products 2/ | Fats and oils 3/ | Cereals and bakery products | Fruit and vegetables: Fresh | Fruit and vegetables: Canned | Fruit and vegetables: Dried | Sugar and sweets | Beverages | All foods | Consumer price index |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1940 | 96 | 94 | 101 | 82 | 97 | 97 | 92 | 101 | 97 | 92 | 97 | 100 |
| 1941 | 108 | 112 | 112 | 94 | 98 | 104 | 98 | 107 | 106 | 102 | 106 | 105 |
| 1942 | 126 | 136 | 125 | 120 | 105 | 133 | 122 | 136 | 126 | 122 | 124 | 116 |
| 1943 | 134 | 162 | 135 | 126 | 108 | 178 | 131 | 159 | 127 | 125 | 138 | 124 |
| 1944 | 130 | 153 | 134 | 123 | 108 | 177 | 130 | 166 | 126 | 124 | 136 | 126 |
| 1945 | 131 | 164 | 134 | 124 | 109 | 188 | 130 | 168 | 126 | 125 | 139 | 128 |
| 1946 | 161 | 169 | 165 | 152 | 125 | 191 | 141 | 190 | 144 | 140 | 160 | 139 |
| 1947 | 217 | 201 | 186 | 198 | 155 | 201 | 166 | 263 | 180 | 187 | 194 | 159 |
| Jan. | 199 | 182 | 190 | 202 | 143 | 184 | 174 | 269 | 176 | 178 | 184 | 153 |
| Feb. | 197 | 170 | 183 | 201 | 144 | 189 | 173 | 270 | 178 | 183 | 182 | 153 |
| Mar. | 208 | 175 | 188 | 219 | 148 | 199 | 173 | 271 | 179 | 187 | 190 | 156 |
| Apr. | 203 | 176 | 179 | 228 | 153 | 201 | 173 | 270 | 179 | 190 | 188 | 156 |
| May | 204 | 179 | 172 | 200 | 154 | 210 | 172 | 268 | 179 | 189 | 188 | 156 |
| June | 217 | 183 | 172 | 188 | 155 | 208 | 170 | 263 | 180 | 181 | 190 | 157 |
| July | 220 | 203 | 179 | 182 | 155 | 204 | 168 | 264 | 180 | 181 | 193 | 158 |
| Aug. | 228 | 212 | 184 | 178 | 156 | 202 | 166 | 263 | 180 | 182 | 196 | 160 |
| Sept. | 241 | 236 | 195 | 177 | 158 | 202 | 157 | 261 | 181 | 187 | 204 | 164 |
| Oct. | 236 | 233 | 190 | 190 | 160 | 201 | 155 | 256 | 182 | 191 | 202 | 164 |
| Nov. | 227 | 225 | 198 | 196 | 168 | 205 | 156 | 252 | 183 | 195 | 203 | 165 |
| Dec. | 227 | 236 | 205 | 208 | 170 | 212 | 158 | 255 | 184 | 198 | 207 | 167 |
| 1948 | | | | | | | | | | | | |
| Jan. | 238 | 214 | 206 | 209 | 173 | 216 | 158 | 257 | 183 | 202 | 210 | 169 |
| Feb. | 225 | 189 | 204 | 194 | 172 | 222 | 158 | 256 | 177 | 204 | 205 | 168 |
| Mar. | 225 | 186 | 201 | 192 | 171 | 214 | 158 | 254 | 174 | 204 | 202 | 167 |
| Apr. | 234 | 185 | 206 | 191 | 171 | 228 | 156 | 252 | 174 | 204 | 208 | 169 |
| May | 244 | 185 | 205 | 197 | 171 | 229 | 156 | 250 | 173 | 205 | 211 | 170 |
| June | 255 | 194 | 206 | 200 | 171 | 225 | 157 | 248 | 171 | 205 | 214 | 172 |

Index numbers from Bureau of Labor Statistics and rounded to the nearest whole number by Bureau of Agricultural Economics.

1/ Includes chicken and fish.

2/ Includes butter.

3/ Excludes butter.

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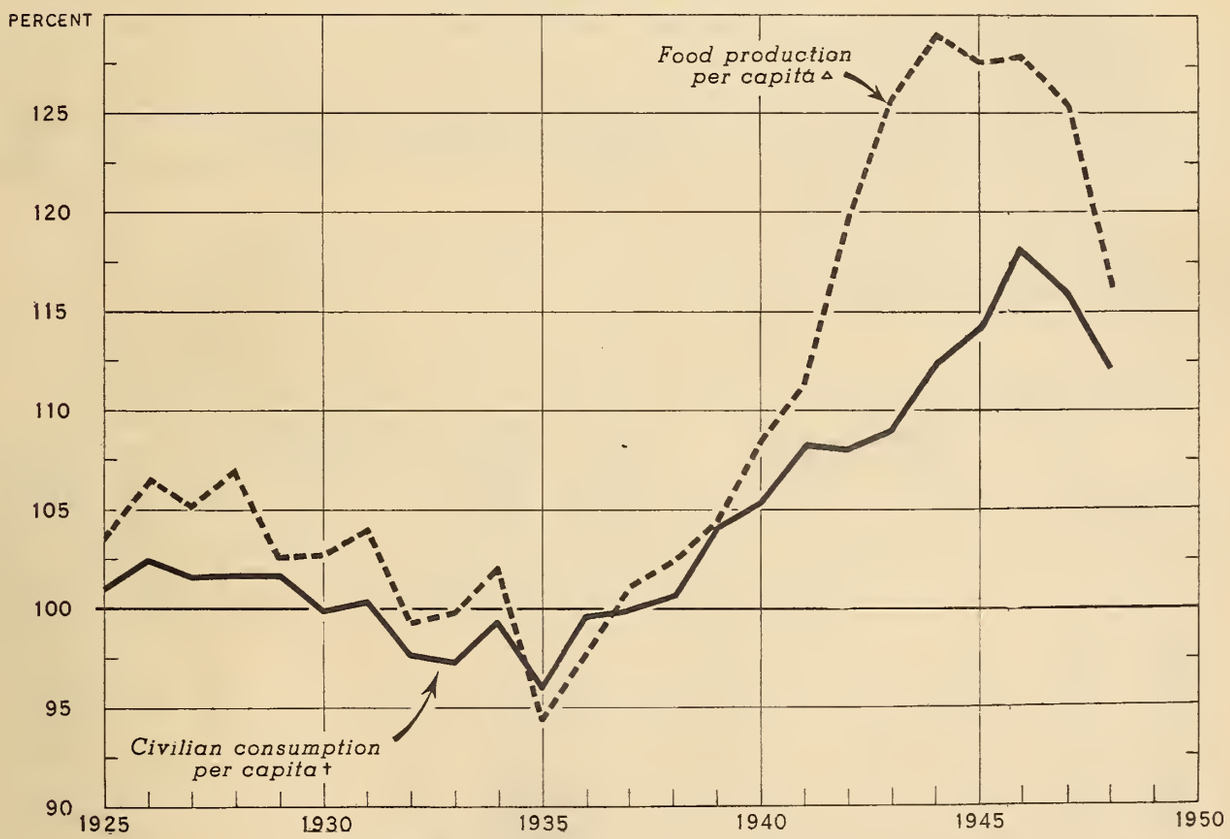
# THE National Food SITUATION

BUREAU OF AGRICULTURAL ECONOMICS
UNITED STATES DEPARTMENT OF AGRICULTURE

NFS-46 BAE OCTOBER-DECEMBER 1948

FOOD PRODUCTION AND CIVILIAN FOOD CONSUMPTION PER CAPITA, UNITED STATES, 1925-48

INDEX NUMBERS (1935-39=100)




DATA FOR 1948 ARE PRELIMINARY

△ PRODUCTION OF PRINCIPAL AGRICULTURAL FOOD COMMODITIES FOR SALE AND FOR FARM HOME CONSUMPTION DIVIDED BY THE TOTAL POPULATION

† AVERAGE CONSUMPTION FOR TOTAL POPULATION, 1925-40; AVERAGE CONSUMPTION FOR CIVILIAN POPULATION ONLY, 1941-48

U. S. DEPARTMENT OF AGRICULTURE NEG. 45402 BUREAU OF AGRICULTURAL ECONOMICS

Over-all food consumption was relatively stable prior to World War II. The lowest per capita consumption was in the depression year 1935, while the highest level was in the postwar year 1946, 18 percent above the 1935-39 average. A 3 percent decline in civilian consumption from the 1947 rate is indicated for 1948, reflecting a decline in total food output, mainly livestock products.

The great increase in food production made possible the high level of civilian consumption during and after the war despite the use of about 1/5 of the total supply during the war years and approximately 1/10 since 1945 by the armed forces and for export. The total volume of production of principal foods for sale and farm home consumption in 1947 was 40 percent above the 1935-39 average, 25 percent above prewar when adjusted for the increase in population. According to indications, total food production in 1948 will be about 32 percent above the prewar average. On a per capita basis, indicated 1948 output will be about 16 percent above the prewar average, but 10 percent below the 1944 peak.

Table 1.-Volume of agricultural production for sale and for farm home consumption and civilian per capita food consumption, 1945-47 and preliminary estimates for 1948 with percentage comparisons

(Index numbers, 1935-39 = 100)

| Item | 1943 | 1944 | 1945 | 1946 | 1947 | 1948 Prel 1/ | 1948 as a percentage of 1947 |
|---|---|---|---|---|---|---|---|
| Food grains 2/ | 116 | 148 | 155 | 164 | 196 | 184 | 94 |
| Truck crops 3/ | 124 | 137 | 142 | 158 | 140 | 139 | 99 |
| Fruits and nuts 4/ | 108 | 123 | 112 | 133 | 129 | 126 | 98 |
| Vegetables, excluding truck crops 5/ | 125 | 106 | 110 | 128 | 107 | 111 | 104 |
| Sugar crops 6/ | 81 | 81 | 94 | 103 | 110 | 95 | 86 |
| Total food crops 7/ | 116 | 129 | 130 | 145 | 148 | 143 | 97 |
| Meat animals 8/ | 150 | 155 | 147 | 145 | 144 | 130 | 90 |
| Poultry 9/ | 152 | 153 | 163 | 153 | 150 | 141 | 94 |
| Dairy products 10/ | 113 | 115 | 119 | 120 | 120 | 118 | 98 |
| Total food livestock | 138 | 141 | 141 | 138 | 137 | 128 | 93 |
| Food production | 133 | 138 | 138 | 140 | 140 | 132 | 94 |
| Agricultural production, food and non-food | 128 | 136 | 133 | 136 | 136 | 134 | 99 |
| Civilian per capita food consumption | 109 | 112 | 114 | 118 | 116 | 112 | 97 |

1/ Production estimates are based on preliminary crop indications as of August 1 and estimated marketings and home consumption of livestock and livestock products for the calendar year 1948.
2/ Includes wheat, rye, rice, and buckwheat.
3/ Includes truck crops for market (artichokes, asparagus, lima beans, snap beans, beets, cabbage, cantaloups, carrots, cauliflower, celery, cucumbers, eggplant, lettuce, onions, peas, peppers, spinach, tomatoes, and watermelons) and truck crops for processing (asparagus, lima beans, snap beans, beets, cabbage, sweet corn, cucumbers, peas, spinach, and tomatoes).
4/ Includes apples, peaches, pears, cherries, apricots, grapes, strawberries, cranberries, oranges, grapefruit, lemons, olives, dried California figs, fresh and dried plums, almonds, pecans, and walnuts.
5/ Includes dry edible beans, potatoes, sweetpotatoes.
6/ Includes sugar beets, sugarcane for sugar, sugarcane sirup, sorgo sirup, maple sugar, and maple sirup.
7/ Includes peanuts in addition to the other crops.
8/ Includes cattle and calves, sheep and lambs, and hogs.
9/ Includes eggs, chickens, turkeys, and broilers.
10/ Includes wholesale milk, retail milk, butterfat, farm butter, and farm consumption of dairy products.

Table 2 - Total food disappearance: Source and distribution, 1935-39 average and annual 1940-48 1/

| Year | Source of total food: Total food disappearance | Source of total food: Food production | Source of total food: Imports | Source of total food: Reduction in stocks | Source of total food: Increase in stocks | Distribution by claimants: Civilian | Distribution by claimants: Military including military civilian feeding | Distribution by claimants: Department of Agriculture 2/: Net purchases | Distribution by claimants: Department of Agriculture 2/: Deliveries | Distribution by claimants: Department of Agriculture 2/: Reduction in stocks | Distribution by claimants: Department of Agriculture 2/: Increase in stocks | Commercial exports and shipments 3/ |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | | | | Percentage of food disappearance in each year | | | | | | | |
| 1935-39 Av. | 100.0 | 93.7 | 6.4 | | .1 | 97.4 | | | | | | 2.6 |
| 1940 | 100.0 | 94.9 | 5.5 | | .4 | 97.8 | | | | | | 2.2 |
| 1941 | 100.0 | 94.7 | 5.8 | | .5 | 94.0 | 1.9 | 2.6 | 2.4 | | .2 | 1.5 |
| 1942 | 100.0 | 94.0 | 3.8 | 2.2 | | 86.6 | 6.2 | 6.2 | 4.7 | | 1.5 | 1.0 |
| 1943 | 100.0 | 95.7 | 4.8 | | .5 | 81.0 | 9.9 | 7.9 | 7.0 | | .9 | 1.2 |
| 1944 | 100.0 | 94.0 | 4.8 | 1.2 | | 78.3 | 12.9 | 6.6 | 7.1 | .5 | | 2.2 |
| 1945 | 100.0 | 94.3 | 4.9 | .8 | | 81.8 | 12.2 | 4/4.0 | 4.8 | .8 | | 2.0 |
| 1946 | 100.0 | 96.4 | 4.1 | | .5 | 89.8 | 3.4 | 4/4.3 | 5.3 | 1.0 | | 2.5 |
| 1947 | 100.0 | 95.9 | 4.8 | | .7 | 89.7 | 3.1 | 4/2.7 | 2.6 | | .1 | 4.5 |
| 1948 Prel. | 100.0 | 94.4 | 4.7 | .9 | | 91.2 | 3.7 | 1.9 | 2.1 | .2 | | 3.2 |
| | | | | | Percentage of 1935-39 food disappearance | | | | | | | |
| 1935-39 Av. | 100.0 | 93.7 | 6.4 | | .1 | 97.4 | | | | | | 2.6 |
| 1940 | 109.7 | 104.1 | 6.0 | | .4 | 107.2 | | | | | | 2.5 |
| 1941 | 113.8 | 107.8 | 6.6 | | .6 | 106.9 | 2.2 | 3.0 | 2.7 | | .3 | 1.7 |
| 1942 | 124.6 | 117.2 | 4.7 | 2.7 | | 107.9 | 7.7 | 7.7 | 5.8 | | 1.9 | 1.3 |
| 1943 | 130.3 | 124.7 | 6.3 | | .7 | 105.7 | 12.8 | 10.3 | 9.2 | | 1.1 | 1.5 |
| 1944 | 137.5 | 129.3 | 6.6 | 1.6 | | 107.7 | 17.7 | 9.1 | 9.7 | .6 | | 3.0 |
| 1945 | 137.1 | 129.3 | 6.8 | 1.0 | | 112.3 | 16.7 | 4/5.4 | 6.5 | 1.1 | | 2.7 |
| 1946 | 136.2 | 131.2 | 5.6 | | .6 | 122.3 | 4.6 | 4/5.9 | 7.2 | 1.3 | | 3.4 |
| 1947 | 136.8 | 131.2 | 6.6 | | 1.0 | 122.7 | 4.2 | 4/3.7 | 3.6 | | .1 | 6.2 |
| 1948 Prel. | 131.0 | 123.7 | 6.1 | 1.2 | | 119.5 | 4.9 | 2.4 | 2.7 | .3 | | 4.2 |

1/ The upper section of the table divides the total disappearance in each year (1) according to the source of the food, and (2) according to its distribution. Both the total disappearance figure and the breakdown are on an index number basis, that is, they represent quantities weighted by average farm prices in the period 1935-39. The disappearance figure includes both domestically produced and imported foods. The lower portion of the table contains the same data expressed as a percentage of total food disappearance in 1935-39 instead of total disappearance in each year. 2/ The quantities assigned to the Department of Agriculture are principally food for lend-lease and relief. These quantities are measured in two ways: (1) in terms of Department of Agriculture purchases from commercial channels, and (2) in terms of shipments out of the country. When measured in terms of purchases, additions to Department of Agriculture stocks included. When measured in terms of shipments, additions to stocks are shown separately. Department of Agriculture shipments were smaller than the total quantities purchased from 1941 to 1943 and stocks were built up. In 1944 to 1946, however, shipments exceeded purchases and stocks were decreased. 3/ The 1935-39, 1940-41 exports and shipments are strictly commercial. For the war years, they approximate the commercial portion as indicated by total exports and shipments less the exports assignable to the Department of Agriculture. 4/ Including transfers for relief from military stocks in U. S.

# THE NATIONAL FOOD SITUATION

Approved by the Outlook and Situation Board, November 16, 1948

## SUMMARY

Domestic food consumption per capita probably will not change much in 1949 from the 1948 average which was 12 percent above prewar. Supplies of a few foods are expected to decline, but supplies of others will increase. Consumption of food per person in 1948 has been at a somewhat lower rate than in 1947, whereas food prices have averaged approximately 10 percent higher.

Retail food prices are expected to continue high through most of 1949, as no significant weakening in either domestic or foreign demand for food appears likely. Some decline in food prices is likely in the latter part of the year as a result of prospective increases in livestock products. If consumers should use more of their purchasing power for nonfood commodities, particularly for durable goods, an additional moderating effect on food prices would be evident.

Although European food production this year is materially higher than in 1947, in many areas it is still low relative to prewar and to population increases. The over-all export demand for American foods is not expected to show much if any decline, but less emphasis will be put on grains. Military procurement of food for use of troops and for civilian feeding programs may continue at about 1948 rates.

Some shifts are indicated in supplies of food for the late fall and early winter of 1948 as compared with 1947. Less beef and veal, chicken, turkey, apples, pears, sweetpotatoes, dry peas, and fluid milk and cream will be marketed, but more manufactured dairy products, vegetable oil products, nuts, fresh vegetables, potates and dry edible beans, sugars and sirups will be available than a year earlier. The reductions in supplies of beef and veal and somewhat lower marketings of fluid milk and cream are expected to continue in 1949. Not until the latter part of the year will the record 1948 feed crops be reflected in increased supplies of pork, chicken and turkey. This year's oilseed crops will provide plentiful supplies of vegetable oils for salad and cooking use, and for the manufacture of margarine and shortening.

In comparison with the prewar years 1935-39, rates of food consumption will continue at a high level next year. Only consumption per capita of butter, dried fruit, potatoes and dry beans are likely to be lower. Consumption of most other livestock products and fruits and vegetables will be noticeably higher than in the prewar period.

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Table 3.- Apparent civilian consumption of major food commodities on a per capita basis, calendar years, 1935-39 average, 1944, 1945, 1946, 1947 and estimates for 1948 with percentage comparisons 1/
(Primary distribution weight)

| Commodity | Average 1935-39 | 1944 | 1945 | 1946 | 1947 | 1948 Prel. | 1948 as a percentage of 1935-39 | 1948 as a percentage of 1947 |
|---|---|---|---|---|---|---|---|---|
| | Pounds | Pounds | Pounds | Pounds | Pounds | Pounds | | |
| Meats (dressed weight) - Total | 126.2 | 153.5 | 144.4 | 153.4 | 155.0 | 145 | 115 | 94 |
| Beef | 55.2 | 55.3 | 59.0 | 61.3 | 69.1 | 63 | 114 | 91 |
| Veal | 8.1 | 12.4 | 11.8 | 9.9 | 10.7 | 10 | 123 | 93 |
| Lamb and mutton | 6.8 | 6.6 | 7.3 | 6.6 | 5.4 | 5 | 74 | 93 |
| Pork (excluding lard) | 56.1 | 79.2 | 66.3 | 75.6 | 69.8 | 67 | 119 | 96 |
| Fish (edible weight) - Total | 11.1 | 8.9 | 10.6 | 11.0 | 10.8 | 11 | 99 | 102 |
| Fresh and frozen | 5.3 | 5.6 | 7.1 | 6.2 | 6.2 | 6.5 | 123 | 105 |
| Canned 2/ | 4.8 | 2.6 | 2.6 | 3.8 | 3.8 ) | 4.5 | 78 | 98 |
| Cured | 1.0 | .7 | .9 | 1.0 | .8 ) | | | |
| Poultry products | | | | | | | | |
| Eggs 3/ | 37.3 | 43.8 | 49.6 | 46.8 | 47.5 | 47.4 | 127 | 100 |
| Chicken (dressed weight) | 17.9 | 26.8 | 28.8 | 25.4 | 23.4 | 22.5 | 126 | 96 |
| Turkey (dressed weight) | 2.6 | 3.3 | 4.3 | 4.5 | 4.5 | 3.4 | 131 | 76 |
| Dairy products | | | | | | | | |
| Total milk (whole milk equivalent) | 801 | 779 | 794 | 809 | 792 | 768 | 96 | 97 |
| Cheese | 5.5 | 4.9 | 5.9 | 6.9 | 7.0 | 7.0 | 127 | 100 |
| Condensed and evaporated milk | 16.7 | 16.1 | 18.3 | 18.8 | 19.6 | 21.0 | 126 | 107 |
| Fluid milk and cream | 340 | 412 | 432 | 420 | 400 | 390 | 115 | 98 |
| Fats and oils - Total, fat content 4/ | 44.7 | 41.2 | 39.5 | 39.6 | 41.7 | 41.8 | 94 | 100 |
| Butter, farm and factory (actual weight) | 16.7 | 12.0 | 10.8 | 10.3 | 11.1 | 10.2 | 61 | 92 |
| Lard | 11.0 | 12.6 | 11.5 | 11.8 | 12.5 | 12.1 | 110 | 97 |
| Margarine (actual weight) | 2.9 | 3.9 | 4.0 | 3.8 | 5.0 | 6.0 | 207 | 120 |
| Shortening | 11.7 | 9.2 | 10.0 | 10.1 | 9.3 | 9.6 | 82 | 103 |
| Other edible fats and oils | 6.3 | 6.6 | 6.0 | 6.3 | 6.9 | 7.0 | 111 | 101 |
| Fruits | | | | | | | | |
| Fresh - total | 137.7 | 143.6 | 143.6 | 140.4 | 145.6 | 134.4 | 98 | 92 |
| Citrus | 48.9 | 67.8 | 65.3 | 58.2 | 61.9 | 54.5 | 111 | 88 |
| Apples (Commercial) | 30.4 | 25.4 | 22.9 | 23.1 | 25.2 | 24.5 | 81 | 97 |
| Other (excluding melons) | 58.4 | 50.4 | 55.4 | 59.1 | 58.5 | 55.4 | 95 | 95 |
| Processed | | | | | | | | |
| Canned fruit | 14.9 | 9.3 | 14.7 | 21.1 | 18.9 | 19.2 | 129 | 102 |
| Canned juices | 3.8 | 9.9 | 10.7 | 17.6 | 16.3 | 17.1 | 450 | 105 |
| Frozen | .8 | 2.0 | 2.3 | 3.1 | 3.2 | 2.9 | 362 | 91 |
| Dried | 5.8 | 6.1 | 5.9 | 4.5 | 4.5 | 4.5 | 78 | 100 |
| Vegetables | | | | | | | | |
| Fresh | 235 | 254 | 265 | 270 | 251 | 253 | 108 | 101 |
| Canned | 31.1 | 34.5 | 43.1 | 46.2 | 40.5 | 38.1 | 123 | 94 |
| Frozen | 5/ .4 | 1.4 | 1.7 | 2.0 | 2.6 | 2.6 | 650 | 100 |
| Potatoes | 131 | 126 | 125 | 127 | 122 | 118 | 90 | 97 |
| Sweetpotatoes | 21.4 | 19.5 | 18.8 | 17.7 | 16.6 | 15.2 | 71 | 92 |
| Dry edible beans | 8.8 | 7.7 | 7.7 | 8.6 | 8.4 | 8.6 | 98 | 102 |
| Sugar (refined) | 96.5 | 89.1 | 73.5 | 74.6 | 91.8 | 95.9 | 99 | 104 |
| Grains | | | | | | | | |
| Corn products: | | | | | | | | |
| Corn meal | 22.9 | 20.4 | 19.9 | 16.7 | 17.1 | 17 | 74 | 99 |
| Corn sirup | 7.7 | 13.5 | 13.7 | 12.5 | 13.2 | 10 | 130 | 76 |
| Corn starch | 1.3 | 1.4 | 1.8 | 1.8 | 1.9 | 1.7 | 131 | 89 |
| Corn sugar | 2.7 | 3.9 | 3.8 | 3.8 | 4.5 | 3.5 | 130 | 78 |
| Breakfast cereals | 1.7 | 2.5 | 2.5 | 2.2 | 2.6 | 2.4 | 141 | 92 |
| Hominy | 1.2 | 1.8 | 1.7 | 1.5 | 1.8 | 1.7 | 142 | 94 |
| Oatmeal | 3.9 | 3.2 | 4.1 | 4.3 | 3.9 | 4.0 | 103 | 103 |
| Barley food products 6/ | 1.2 | 1.4 | 1.5 | 1.8 | 1.8 | 1.7 | 142 | 94 |
| Wheat: | | | | | | | | |
| Flour 7/ (Revised) | 152.3 | 9/162.2 | 159.1 | 151.7 | 142.5 | 140 | 92 | 98 |
| Breakfast cereals | 3.7 | 3.7 | 3.7 | 3.5 | 3.5 | 3.5 | 95 | 100 |
| Rye flour | 2.2 | 2.6 | 2.6 | 1.9 | 1.7 | 1.9 | 86 | 112 |
| Rice, milled | 5.6 | 4.9 | 4.7 | 4.1 | 4.9 | 4.8 | 86 | 98 |
| Beverages | | | | | | | | |
| Coffee 8/ | 14.0 | 15.7 | 16.3 | 20.0 | 17.4 | 18 | 129 | 103 |
| Tea | .67 | .53 | .59 | .53 | .57 | .5 | 75 | 88 |
| Cocoa beans | 4.4 | 3.6 | 4.0 | 4.1 | 4.1 | 4 | 91 | 98 |
| Peanuts (shelled) | 4.4 | 5.8 | 6.4 | 5.0 | 4.6 | 4.6 | 105 | 100 |

Population estimates used to obtain per capita consumption figures are official Census estimates of total population adjusted for underenumeration of children under 5 and for military personnel not eating out of civilian supplies.
1/ Data on calendar year basis except for dried fruits which are on a pack year basis; fresh citrus fruits and peanuts on a crop year basis, rice on August 1 year. All years begin in year indicated except for fresh citrus, which begins in October of the previous year and rice which begins in August of previous year. 2/ Excludes canned food products containing small quantities of fish such as clam chowder, etc. 3/ In terms of number of eggs, the apparent per capita consumption was 298 in 1935-39, 350 in 1944, 397 in 1945, 374 in 1946, 380 in 1947 and 379 estimated for 1948. 4/ Computed from unrounded data. 5/ Average 1937-39. Data prior to 1937 are not available. 6/ All barley food products in terms of malt equivalent. 7/ Includes white, whole wheat, and Semolina flour. 8/ Green bean basis. 9/ Unrevised.

## RETAIL FOOD PRICES

Demand for food is expected to continue strong in 1949. If economic trends and government programs develop according to current indications, consumer income and expenditures are likely to remain at high levels. Some weakening in retail food prices might occur particularly in the latter part of the year when output of livestock products is expected to increase as a result of record supplies of feed. Furthermore, continuation of increases in consumer expenditures for nonfood items such as durable goods may have a moderating effect on food prices.

In general, the outlook is for a relatively stable level of economic activity in 1949. Continuation of aid to foreign countries, increasing expenditures for defense by the Federal Government, and growth in State and local expenditures for construction of schools and highways give considerable assurance of a high level of demand, for the first half of the year at least. Moreover, the impact of these expenditures on a generally tight economy might cause some further increases in retail prices, particularly in the case of nonfood commodities.

Exports of food in 1949 are not expected to show much if any decline from 1948. Despite marked improvement in production of food crops in Europe in 1948 as compared to 1947, sizable imports will again be needed to provide for more equitable rations and to rebuild stocks to reasonable working levels. It appears probable that the demand for food grains will be less. If the export demand for food should turn out to be no greater in 1949 than in the current year, and if the output of food, particularly of livestock products, should increase much more than seasonally after the middle of the year, retail food prices may decline somewhat late in the year.

Retail prices for meat and dairy products are expected to average about the same as in 1948. During the latter part of the year, however, sharply increased hog marketings may cause pork prices to decline more than seasonally. Prices of eggs may average almost as high as in 1948 but prices of poultry meats are likely to average lower, with most of the decrease occuring during the latter months of the year. Somewhat lower retail prices for cereal products in 1949 are anticipated. However, the decline from the 1948 level is not likely to be so great as are the price declines for grains as such.

## NUTRITIONAL OUTLOOK 1/

Present indications of civilian food supplies in 1949 point to no significant change in the per capita supplies of nutrients as compared with 1948.

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1/ Prepared in cooperation with the Bureau of Human Nutrition and Home Economics.

Continued practice of the enrichment of white bread and flour with iron, thiamine, riboflavin and niacin has contributed to the larger supplies of these nutrients than in any pre-World War II year. Likewise, high consumption of leafy, green and yellow vegetables, citrus fruit and tomatoes, and milk products (except butter) has kept the available supplies of Vitamin A value, vitamin C and calcium above prewar years. At the same time that the per capita supplies of minerals and vitamins have increased, the supply of food energy remained about the same as the 1935-39 average. This indicates an improvement in the quality of the overall food supply.

Civilian per capita food consumption and available supplies of most nutrients have shown some decline since 1946. When all foods are combined on a price-weighted basis, 1946 proves to be the peak year of the past 40 years for civilian per capita consumption. Since 1946, the declines in the consumption of a number of foods, including fluid milk, meat, potatoes, dry beans, and several vegetables, have reduced available supplies of vitamins, minerals, and protein by 4 to 8 percent. On the other hand, the increase in sugar consumption has provided more carbohydrate.

Table 4.- Nutrients available for civilian consumption per capita per day, calendar years, 1935-39 average, 1943 to 1947 and preliminary estimates for 1948, with percentage comparisons 1/

| Nutrients | Units | Aver-age 1935-39 | 1943 | 1944 | 1945 | 1946 | 1947 | 1948 prel. | 1948 as a percentage of 1935-39 | 1948 as a percentage of 1947 |
|---|---|---|---|---|---|---|---|---|---|---|
| Food energy | Cal. | 3,250 | 3,420 | 3,470 | 3,370 | 3,380 | 3,390 | 3,330 | 102 | 98 |
| Protein | Grams | 89 | 100 | 100 | 103 | 100 | 98 | 96 | 108 | 98 |
| Fat | Grams | 132 | 144 | 145 | 138 | 145 | 144 | 141 | 108 | 98 |
| Carbohydrate | Grams | 428 | 430 | 440 | 428 | 418 | 424 | 421 | 98 | 99 |
| Calcium | Grams | .90 | 1.02 | 1.04 | 1.08 | 1.12 | 1.07 | 1.06 | 118 | 99 |
| Iron | Mg. | 13.8 | 16.9 | 18.5 | 19.0 | 18.7 | 18.2 | 17.5 | 127 | 96 |
| Vitamin A value | I.U. | 8,100 | 9,200 | 9,400 | 9,800 | 9,300 | 8,800 | 8,700 | 107 | 99 |
| Thiamine | Mg. | 1.54 | 2.21 | 2.28 | 2.24 | 2.27 | 2.14 | 2.09 | 136 | 98 |
| Riboflavin | Mg. | 1.86 | 2.21 | 2.48 | 2.55 | 2.56 | 2.44 | 2.38 | 128 | 98 |
| Niacin | Mg. | 15.4 | 19.5 | 21.6 | 21.9 | 21.5 | 20.7 | 19.9 | 129 | 96 |
| Ascorbic acid | Mg. | 115 | 126 | 132 | 159 | 136 | 130 | 127 | 110 | 98 |

1/ Data computed by the Bureau of Human Nutrition and Home Economics on the basis of estimates of apparent civilian consumption (retail basis) including estimates of consumption from urban gardens, supplied by the Bureau of Agricultural Economics. No deductions have been made in the nutrient estimates for the loss or waste in the home or for the destruction or loss of nutrients during the preparation of food. Deductions have been made for inedible refuse. The data for iron, thiamine, riboflavin, and niacin include the amounts of these nutrients added to white bread and flour under the enrichment program. The 1947 and 1948 estimates assume that voluntary enrichment continues at the rate required under WFO-1.

## COMMODITY REVIEWS

### Meats

Meat supplies have been increasing seasonally as hogs from the spring pig crop move to market and slaughter. However, supplies are somewhat short of those in the comparable period of 1947, with reductions particularly in beef and veal. The smaller supply of available meat this fall and in the early part of the winter in comparison with last year results mainly from reduced numbers of cattle and sheep on farms. Cattle slaughter under Federal inspection in early November was almost one-fifth less than last year. Hog slaughter and pork production in the entire October-April season will be a little below that a year earlier, because of a slightly smaller pig crop this last spring and the holding of more gilts and sows for breeding. But a somewhat heavier early movement of hogs this fall brought pork output up to 1947 levels.

Most meat prices normally decline in the late fall as meat supplies increase, although at a somewhat slower rate than the gain in supplies. A moderate decline in meat prices has occurred since September this year.

Prospects are for meat consumption per person in 1949 at about 140-145 pounds dressed weight compared with 145 pounds now estimated for 1948. Consumption of meat averaged 126 pounds per person in 1935-39 and the peak of the last 40 years was reached in 1947, 155 pounds.

Production and consumption of meat in the last several years has not kept pace with rising employment and incomes, and meat prices have increased substantially.

More of next year's meat will be pork with less of the other meats available. Although supplies of beef and veal will be smaller next year, more of the beef will be of better grades as more cattle will be grain-fed.

Although 1949 will not be a year of increased meat supplies, it could be followed by years of increased supplies. The bumper crops of 1948 have provided the largest supplies of feed grains on record, and the supply of all concentrates combined is second only to the peak year 1942. There is little doubt that production of pork will expand considerably. Hogs from the larger pig crop in prospect for the spring of 1949 will be marketed late next year, at which time supplies of meat are expected to increase materially. Because of smaller inventories of cattle and sheep, the supply of beef, veal, lamb and mutton will be still smaller in 1949 than in 1948.

As production of meat will not differ greatly next year from this, changes in meat prices will be due mainly to changes in demand. If employment and incomes hold their present levels, meat prices are likely to remain high. However, even in this case some moderate reduction from late 1948 prices is possible. Pork prices in 1949 are likely to be relatively lower than are beef prices and they are likely to decline in the last months of that year as the expected heavy movement of hogs to market begins.

Fish 1/

Civilian consumption of fish, especially of the fresh and frozen products, is expected to continue at a high rate during the remainder of the year. Supplies of fresh and frozen fish will be plentiful throughout the fall season. Retail prices of these commodities probably will remain at or somewhat above the current level.

Commercial fishing activities are likely to continue in full swing so long as the weather permits. Commercial freezing of fish is expected to continue on a scale consistent with the supply of raw materials. Supplies of canned fish available for market probably will be no larger than a year ago. Although the 1948 pack of tuna will exceed last year's record output by a half million cases or more if fishing operations continue uninterrupted, production of salmon will be lower than in 1947 and it may be the lowest since 1921. For the first time in history, tuna-fishing operations were conducted in the waters adjacent to Alaska. In previous years, although tuna were occasionally caught in this area, fishermen preferred to concentrate their efforts on the salmon run.

Imports of fish, especially of fresh and frozen groundfish and rosefish fillets, probably will continue above last year's rate. Exports of fishery products are expected to continue small.

Supplies of fish, except possibly those of canned fish, are expected to be plentiful throughout most of 1949. Civilian demand for fish is likely to continue strong throughout most of the year. During the latter half, retail prices of fish could recede somewhat from early 1949 levels if market supplies of livestock products increase as is currently anticipated.

Imports of fish, especially fresh and frozen fillets, are expected to continue at a high rate during most of 1949. Receipts of fresh and frozen fillets from Iceland may be larger than in 1948.

Military procurement of fish and fishery products in 1949 is likely to be slightly higher, but exports probably no larger than in 1948. Exports were low in 1948 relative to the levels reached in the two preceding years. This was due in large part to the shortage of dollar resources of foreign countries. This situation is likely to be a deterrent factor in the expansion of exports in 1949 above the preceding year's level.

Poultry and Eggs

Supplies of fresh eggs available to consumers are seasonally smaller than during any of the previous quarters of the year, but slightly larger than in the last part of 1947. Commercial cold-storage holdings of shell eggs on November 1, 1948 were slightly smaller than a year earlier. Egg prices will reach the seasonal peak during the fourth quarter, and they are likely to be slightly higher than a year earlier.

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1/ Prepared in cooperation with the Fish and Wildlife Service, Department of the Interior.

Marketings of farm chickens and turkeys will be seasonally heaviest during the fourth quarter of 1948, but due to decreases in numbers raised, the volume will be somewhat lower than during late 1947. Offerings of commercial broilers, however, will be larger than during the fourth quarter of last year. Commercial cold-storage holdings of chickens and turkeys on November 1, 1948 were slightly more than half as large as those on the previous November 1. Prices for chickens probably will be somewhat higher than a year earlier, though slightly lower than during recent months. Turkey prices are expected to reach record levels during the holiday season.

For 1948 as a whole, consumers are expected to use about as many eggs as in 1947, but somewhat less chicken and turkey. Nevertheless, consumption of all three items in 1948 will be more than a fourth larger than in 1935-39. In 1949, consumers are likely to use about as many eggs as in 1948, and somewhat more chicken and turkey meat.

Only relatively small quantities of eggs and poultry are exported. Shipments of dried eggs for foreign aid and relief feeding programs have been larger than previously anticipated, although substantially smaller than shipments under wartime programs. Shipments this year have been largely from stocks of dried eggs acquired by the Department of Agriculture in price-support operations. Commercial exports of eggs have been relatively small, as have commercial poultry exports. Moderate improvements in egg output in foreign countries in 1949, continued dollar shortages and increased availability of other foodstuffs might result in smaller export outlets for eggs. Some increase in imports of poultry occurred in 1948, but the quantities involved were not important in total, and with heavier domestic production in 1949, the volume imported is likely to be smaller.

Production of eggs in 1949 may be about as large in total as in 1948. Numbers of potential layers on farms on January 1, 1949 are likely to be slightly smaller than a year earlier. Assuming a continuing upward trend in rate of lay, production of eggs during the first half of 1949 may average close to that in the same period of 1948. More favorable egg-feed price relationships during late 1948 and early 1949 are expected to induce a substantial increase in numbers of farm chickens raised in 1949 which means larger numbers of potential layers coming into production next fall. By the fourth quarter of 1949, therefore, production is expected to be higher than during the latter months of this year. Egg prices during the first half of 1949 are expected to be at least as high as during the first half of 1948. However, by the last quarter of 1949, prices of eggs are likely to be somewhat lower than those of late 1948.

Larger supplies of feed at lower prices this fall and next spring, and record or near-record farm prices during the coming months are likely to result in somewhat larger production of farm chickens and turkeys during 1949. As the spring months are the customary hatching period for turkeys and for the bulk of farm chickens, the effect of these increased supplies will not be felt until the second half of 1949. Production of commercial broilers from year-round hatchings is likely to be about the same in total as in 1948. Prices for farm chickens, broilers and turkeys are likely to average somewhat lower than in 1948, with most of the decrease during the latter months of 1949.

Dairy Products

Output of dairy products are currently at their year's low although at about the same rate in total as in the comparable months of 1947. Civilian supplies of dairy products per capita are slightly larger than a year earlier. Less fluid milk and cream probably is being consumed but more milk is going into manufactured products. Prices of fluid milk are up about the same as consumer incomes. Manufactured dairy products are being exported at about the same rate as in late 1947. Because of continued strong domestic demand, prices of major dairy products as a group are about as high as a year earlier. In early November all except butter, cheese and dry whole milk were selling at prices higher than those of November 1947.

Civilian supplies of milk and manufactured dairy products in 1949 probably will exceed slightly the below-average consumption of 768 pounds apparently consumed in 1948 (in terms of whole milk equivalent on fat solids basis). Per capita consumption of the nonfat ingredients of milk will again be one-fifth to one-fourth greater than before the war and it will differ little from that of recent years. However, with continued large consumer incomes, retail prices of dairy items as a group next year may differ little from the record high average levels of the current year.

Production of milk next year is likely to be slightly larger than in 1948. The decline in numbers of milk cows is in the fifth consecutive year and probably will continue into 1949. However, average output per cow is likely to surpass even the record reached in 1948. The basis for these expectations is the record large feed supply and the considerably more favorable dairy product-feed price relationships.

Prospective high consumer incomes for most of 1949, at least, probably will be reflected in a continued high level of retail prices of fluid milk. In early November retail prices of milk were 8 percent higher than in November 1947, and they will be about as high as a year earlier through early 1949 at least. Later in 1949, expenditures for durable goods may increase relative to those for foods. Consumption of fluid milk and cream in 1949 may be a little less than the 390 pounds per person consumed this year but it will be well above the 340 pounds of prewar years. In recent years, consumption of fluid milk and cream has accounted for around half of the milk equivalent (fat-solids basis) of all dairy products consumed. Consumption of evaporated milk next year probably will not differ significantly from the record rate attained in 1948. Retail prices may average nearly as high for the year as a whole, but they probably will not reach the record levels of mid-1948.

Exports of whole milk products in 1949 may be as large, possibly larger, than this year when they accounted for about 2 percent of farm production of milk in the United States. Outshipments of nonfat dry milk solids may be somewhat larger than this year. Procurement under the program of the ECA is likely to be on a larger scale compared with the rather limited operation in 1948. It will be partly financed by the use of ECA funds allocated to dairy products from the 1948 calendar year. Also, supplies will be purchased for the Children's Fund of the U. N.

Per capita supplies of all major dairy items will be near 1948 levels and, except for butter, they will be above any prewar year. Any increase in per capita output of butter from the record low of 1948 will be relatively small as consumption of fluid milk and cream will be wellabove average again in 1949, and production of milk in principal butter-producing areas is likely to increase little, if any from the 1948 output.

Fats and Oils

Somewhat larger supplies of fats and oils products will be available for civilian consumption during the next year. Most of the improvement will be in vegetable-oil products until the fall of 1949, when substantially increased supplies of lard may be produced from slaughter of hogs of the 1949 spring pig crop. Only slight improvement in butter production appears possible.

Bumper 1948 crops of cottonseed and soybeans assure a substantial increase in the 1948-49 (marketing year) production of the vegetable oils used mainly for food. Total output of cottonseed, soybean, corn and peanut oils in October 1948 - September 1949 probably will be nearly 15 percent larger than the 3.1 billion pounds (crude basis) produced a year earlier. However, stocks of these oils October 1 (the latest reported) were about 150 million pounds smaller than a year earlier and the smallest in more than 20 years.

Exports of edible vegetable oils may also increase moderately. Most of this increase, however, is likely to be in the form of soybeans. Export allocations for soybeans in October - December 1948 total nearly 8 million bushels compared with actual exports of 0.5 million bushels a year earlier and a total of less than 3 million bushels in the 12 months ended September 1948. Total production of margarine, shortening, mayonnaise, and cooking and salad oils for civilians in the United States probably will increase moderately in 1948-49, but not to the extent indicated by the rise in production of the vegetable oils used in these products. Perhaps most of the increase will be in output of salad and cooking oils (including oils used in mayonnaise and salad dressing). Consumption of these products showed a rising trend before the war but it declined materially during the wartime scarcity of oils, and it is still slightly below prewar. With lard supplies as large or larger than in 1948, any increase in consumption of shortening probably would be relatively small. Likewise, with a slight increase in butter supplies possible, consumption of margarine may increase only moderately in the coming year. Consumption of margarine in 1948 has been at a record high level of more than 6 pounds (actual weight) per person compared with less than 3 pounds per person in 1935-39.

Lard production in 1949 probably will be larger than in the year 1948. The record 1948 corn crop and a favorable corn-hog ratio are expected to result in a moderate increase in the 1948 fall pig crop. These hogs are likely to be fed to slightly heavier weights than a year earlier, and this may give a moderately higher yield of lard per hog slaughtered next spring and summer. The principal effect of the large 1948 corn crop on lard output will appear in October 1949, when the 1949 spring pig crop will begin to move to market.

The prospective moderately larger production of milk and some slight decline in marketings of fluid milk would permit butter production to increase slightly.

Retail prices of shortening, margarine, cooking and salad oils declined in September and October, reflecting price declines in crude cottonseed, peanut, corn and soybean oils in August and September. These prices probably have adjusted to the new crop-year level; in late October there were moderate advances. Lard prices have been relatively stable since early 1948 and until recently were low in relation to prices of edible vegetable oils. Butter prices, which have declined substantially since mid-summer, apparently have been considerably influenced by the increased supplies of other fats.

Prices of food fats and oils in the 12 months beginning October 1948 are likely to average moderately lower than a year earlier, because of a moderately increased supply available for consumption in the United States.

Table 5.-Retail price per pound of butter, margarine, lard and shortening, leading cities of the United States, in specified periods

| Item | 1924-29 average | 1937-41 average | 1945 average 2/ | October 1946 - September 1947 | October 1947 - September 1948 | October 1948 |
|---|---|---|---|---|---|---|
| | Cents | Cents | Cents | Cents | Cents | Cents |
| Butter | 55.0 | 37.0 | 50.7 | 81.5 | 89.8 | 77.4 |
| Margarine | 28.7 | 17.3 | 24.1 | 40.3 | 41.6 | 40.2 |
| Lard | 19.8 | 12.6 | 18.8 | 32.4 | 31.0 | 29.2 |
| Shortening 1/ | 24.7 | 20.4 | 24.6 | 43.5 | 43.9 | 42.6 |

Bureau of Labor Statistics

1/ In containers other than cartons. This is chiefly hydrogenated shortening.

2/ Representative of the wartime level, under price ceilings.

## Fruit

Supplies of most fresh and processed fruits will continue large this winter and next spring; this will mean consumption per person at about the present level. Although retail prices of fruits in general probably will be about the same as a year earlier, prices for some fresh and canned fruits may be a little higher because of smaller production.

With smaller crops this year than last, supplies of apples and pears will be moderately reduced this winter and spring, and prices probably will be somewhat higher. Grapes will continue plentiful at prices near those of last year. But more fresh cranberries are expected to be on the market this fall at moderately lower prices, as are also considerable supplies of canned cranberries at lower prices.

Supplies of fresh oranges and grapefruit are expected to continue plentiful, probably at prices near those of the 1947-48 season.

As usual, domestic supplies of fruit will be supplemented by shipments from territories and imports from foreign countries. Most of the shipments from territories will consist of canned pineapple and pineapple juice from Hawaii. The quantity received in the 1948-49 season probably will be about as large as that of the 1947-48 season, though still a little under prewar (1935-39). Bananas will constitute the largest item of fresh fruit imported in 1949, perhaps slightly exceeding the quantity imported in 1948. Imports in 1947 were a little larger than the average for 1935-39, and in 1948 they are providing for per capita consumption at the rate of about 20 pounds per year. Exports of fresh and processed fruits probably will continue low during the 1948-49 season.

Consumption of dried fruits per person will continue at the relatively low rate of the last 2 years, around 4.5 pounds. Total packs of dried fruits have been running about equal to the 1935-39 average, but consumer demand has been light despite some decline in retail prices in the last year. Retail prices of prunes (the only dried fruit item now priced by the Bureau of Labor Statistics) have shown a lesser reduction than have prices at wholesale and to growers. The 1948-49 pack of dried fruit is moderately smaller than the 1947-48 pack. The Department of Agriculture has announced that it will buy up to a maximum of 200,000 tons from the new pack for relief feeding in foreign countries by the Army and for school-lunch and institution use in this country. In 1947-48, the Department bought nearly 275,000 tons, of which 195,000 tons were designated for shipment abroad by the end of August, mostly for distribution in Germany by the Army. About 25,000 tons have been distributed in the United States or its territories under the school-lunch program or to institutions. An additional 80,000 tons were exported through commercial channels.

The 1948-49 pack of commercially canned fruits is somewhat smaller than the 1947-48 pack, but stocks of several important fruits were larger at the beginning of the pack season than a year earlier. The new packs of most canned fruits are smaller than a year ago, with pears showing the largest decrease. On the other hand, the pack of apricots is nearly half again as large as a year ago. Domestic supplies, plus imports that are expected to be about as large as last season, will permit per capita consumption to continue at the present annual rate of about 19 pounds.

Supplies of canned fruit juices will be plentiful again this winter. The 1948-49 packs are expected to be about as large as the 1947-48 packs, and shipments of pineapple juice from Hawaii again will be large. Per capita consumption of all canned fruit juices in 1948-49 might reach 17 pounds. Consumption of canned citrus juices has been heavy during the last summer, and stocks are now at the seasonal low.

Supplies of frozen fruit, fruit juices and berries are expected to be large enough this fall and winter to maintain per capita consumption near the current annual rate of about 3 pounds. Total stocks in cold storage November 1, 1948, amounted to 365 million pounds, 10 percent smaller than a year earlier. Stocks of individual items were lower than a year earlier, except those of strawberries, raspberries, and fruit juices and purees. Those of strawberries were about 78 percent larger than last year.

Of the total storage stocks this November 1, about 27 percent consisted of strawberries and 17 percent of cherries. The total 1948 pack of frozen fruit probably will be a little larger than that of 1947, and in 1949 it may further increase slightly.

Tree nuts are expected to be more plentiful in the 1948-49 season than in 1947-48 because of larger domestic production. Aggregate production of walnuts, almonds, filberts and pecans in the United States is estimated to be about 188,000 tons, unshelled, 16 percent larger than in 1947 and a new record. All four crops are considerably above average, and the pecan crop sets a record. Imports in the 1948-49 season probably will approximate those of 1947-48, which were less than two-thirds as much as domestic production. Imports will include, particularly, Brazil nuts, cashews, and chestnuts but considerable quantities of almonds and filberts also may be imported. Per capita consumption probably will continue at the current annual rate of a little over one pound, shelled basis. Lower prices seem likely this season, with the possible exception of walnuts.

Vegetables

Somewhat larger supplies of fresh vegetables are in prospect for this fall and winter than a year earlier. Commercially grown truck crops for fresh market this fall are about a fifth larger than in the fall of 1947 and about a sixth larger than average. Snap beans, cabbage, carrots, eggplant, green peas and tomatoes are expected to be up a fifth or more. Only the cucumber and green pepper crops are substantially smaller than last fall. All crops except green peppers, green peas and spinach are above average. Winter supplies of storage crops, principally cabbage, carrots and onions, probably will be average or larger in sharp contrast with the very low storage supplies available last year. Early reports of acreage and production of crops for winter harvest compare favorably with last winter. With these prospects for increased supplies, retail prices are likely to be substantially lower than in the fall and winter of 1947-48.

Total supplies of canned and frozen vegetables are moderately smaller than those in the fall of 1947. There was a moderate reduction in this year's pack of canned vegetables, and some reductions in wholesale stocks of canned and frozen vegetables. However, some further reduction in stocks would permit the continuation of the 1948 rate of consumption per person of canned and frozen vegetables well into 1949.

Fall and winter supplies of potatoes and dry edible beans are larger than a year earlier, and ample supplies are assured for the first half of 1949. Supplies of sweetpotatoes and dry field peas are smaller this year than last. Retail prices of potatoes, sweetpotatoes and dry peas this fall are expected to be near last year's levels, but prices for dry beans probably will be somewhat lower.

Production of vegetables in 1949 will depend not only upon the weather but also upon farmers' responses to lower goals and price prospects for some of these crops, and to higher costs of production and marketing. Domestic demand for vegetables generally for 1949 is expected to be about as strong as for 1948. Demands for export and military use, including relief feeding are relatively small factors in the total demand for vegetables.

Food Grains

Prospects for the supply of and the demand for food grains during 1948-49 differ considerably in several respects from those of 1947-48. The near-record wheat and oat crops and the record corn crop in this country; and considerable improvement in food-grain crops in Europe all contribute toward easing the tight situation in food grains of the last 3 years. Domestic consumption of cereal products is not likely to change very much from the current rate, but prices of some of the products probably will be lower.

The 1948 crop of wheat is currently estimated at 1,284 million bushels. Domestic food use in 1948-49 will account for about 500 million bushels. Nonfood use will be sharply less because of the record corn crop which, with other feeds, will provide plentiful supplies for livestock and poultry feeding. Only insignificant quantities of wheat are expected to be used in the production of spirits and alcoholic beverages. Although supplies from the recent wheat crop have been moving rapidly into export, total exports for the year do not seem likely to amount to as much as the 486 million bushels exported in 1947-48. Accordingly, it appears likely that the carry-over into the 1949 crop-year will be somewhat larger than that at the beginning of this year.

Although the actual exports may not be much less than in 1947-48 the need for imports of wheat and wheat flour by deficit producing countries in 1948-49 will be much smaller. Quantities of wheat and flour procured by the United States Government for civilian relief, principally for occupied areas, are expected to be somewhat less in 1949 than the 185 million bushels estimated for 1948.

Prices of flour declined after early May following the fall in prices of wheat, but because of the sharp decline in prices of mill feeds, prices of flour did not move downward as much as wheat prices. Moreover, flour prices advanced again in mid-November to about the May levels, reflecting advancing wheat prices.

Outlook for rye in 1949 includes slightly higher consumption per person and lower prices for rye flour as the demand situation for all food grain eases. Consumption of rye flour in 1948 has been slightly larger than in the previous year but substantially less than in the prewar years 1935-39. Further increases in domestic consumption next year will depend in part on a slightly larger rye crop than in 1948. Use of rye for feed, seed, and alcohol next year may not differ much from that of 1948.

As a result of the record rice crop, supplies of rice are at an all-time high for the year beginning August 1948. Civilian consumption of milled rice has continued in 1947-48 at about the same rate as the 4.9 pounds consumed per capita in 1946-47. The 1935-39 average was 5.6 pounds. Prices to growers for the 1948 crop are somewhat lower than for the previous crop so it is expected that retail prices will show some decline. A decline in retail prices might result in some increase in domestic food use next year. Exports of rice will continue very heavy, however.

The record supply of corn this year and the above-average supplies of oats and barley will be reflected in increases in domestic consumption as food of some of the products of these grains, and in lower prices during 1948-49 as compared with those of 1947-48. Prices of corn products and barley malt have already declined considerably from the peaks of early 1948.

The sharp increase in production of corn in the commercial corn-producing area this year will result in a marked increase in the quantity of corn sold by farmers. Larger sales of corn will provide ample supplies of corn for domestic industrial and food uses and for export. Production of wet-process corn products, corn meal, and prepared cereals are expected to increase as a result of the larger commercial supplies of corn and of the lower prices. Exports of corn will be up sharply from the low level of 1947-48 -- probably to around 127 million bushels, the quantity exported in 1946-47.

Sugar

Current information indicates that domestic consumption of refined sugar will be about 95 to 100 pounds per person in 1948.1/ This compares with estimated consumption of about 90 pounds in 1947 and the 1935-39 average of 96 pounds. Demand for sugar in 1949 is expected to approximate that of 1948 and prospective supplies are sufficient to meet the demand.

Official estimates as of October 1 indicate that the 1948-49 domestic crops will yield about 9 percent less sugar than those of 1947-48, assuming average sugar recovery. Although an increase as high as 25 percent over 1947-48 may be expected in domestic production of cane sugar (again assuming normal sugar recovery), a decrease of 16 to 20 percent is indicated for output of beet sugar.

Production in the 1948-49 crop-year will continue high in the areas that supply the United States sugar needs. Present reports indicate a crop of about 10.5 million tons for the United States, its insular possessions, Cuba and the Philippines. Although this production is more than 8 percent smaller than the record high production of the 1947-48 crop-year, it is about 27 percent larger than the prewar 1935-39 average.

The provisions of the Sugar Act of 1948 will continue in operation in 1949. In December, the Secretary will announce the quantity of sugar needed to meet the requirements in 1949 of United States consumers. This estimate is arrived at after an analysis of supply and demand conditions, and it may be adjusted during the year. After the estimate of consumption is made, quotas are established for both the foreign and the domestic producing areas that supply the United States market.

1/Estimation of domestic sugar consumption is particularly complicated by inadequate information on substantial holdings of distributors and heavy users.

## WORLD FOOD PROSPECTS FOR 1948-49 1/

Prospects for meeting world food needs in the 1948-49 consumption year are brighter than in any of the preceding postwar years. The marked recovery in crop production in Europe, the larger crops in Canada, and the record crop output in the United States have considerably increased world supplies of food, particularly supplies of bread grains and feed grains. About as much food is expected to move from surplus producing areas of Eastern Europe and Russia to Western Europe as in 1947-48. Production of the principal food crops in the rest of the world may be about the same as a year earlier, with moderate increases in the Middle and Far Eastern areas about offsetting probable decreases in the Southern Hemisphere countries.

Production of practically all European food crops in 1948 promises to be considerably better than in 1947. Output of bread grains is 37 percent higher than last year although it is still short of the prewar average. A significant increase is expected in production of coarse grains, hay and fodder crops. The potato crop is expected to be at least equal to the prewar average for the first time since the war and bountiful crops of other vegetables are being harvested. A somewhat larger crop of sugar beets is expected and oilseed crops are larger than a year ago. Fruits and olives are about the only crops with a smaller production this year, and the decline in the olive crop is partly offset by the carry-over of olive oil from last year's large crop.

Despite the substantial increase in production in Europe, the domestic food supply there is still somewhat below prewar and the population is at least 10 million larger. Production of bread grains (wheat and rye), the principal source of food, was 88 percent of the prewar average. Domestic supplies of meats and dairy and poultry products are still lower compared with prewar, which increases the requirements for bread grains as a substitute food. Many countries have already derationed bread or increased the bread ration, decreased the flour extraction rate, and reduced the mixture of coarse grains in bread flour. There is also the need to build up working stocks of cereal grains. All of these factors point to a large demand for bread grains in European countries during 1948-49.

The demand for bread grains in other parts of the world during the current consumption year will also be strong. The Far East will continue to be a deficit food producing area and it will require large quantities of wheat and coarse grains to maintain its meager diets. During the last year sugar and other foods have been used as substitutes for rice and flour. Plans call for a sharp reduction in the proportion of sugar in the staple rations as increased cereal supplies become available.

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1/ Prepared by the Office of Foreign Agricultural Relations.

The 1948 bread grain crops in India, China and Japan are slightly better than in 1947. These countries are also the principal rice producers. Conditions for the crop to date have been at least as favorable as a year ago; so it is probable that the rice output of the Far East will continue the gradual upward trend of postwar years. Production of rice in the principal surplus-producing areas of southeastern Asia, however, will still be much below prewar. Civil disturbances in Burma have restricted the movement of the 1947 rice crop, and planting goals for the 1948 crop, which called for a further expansion in acreage, were not reached. Some increase may occur in the Siamese rice crop, but supplies available for export from French Indo-China probably will continue to be negligible as an agreement between the various political factions has not been reached. Uncertainties still exist in the political situation in the Netherland Indies and return to prewar levels of production has been retarded.

Nearly all of the countries in the Southern Hemisphere harvested food crops in 1947-48 that were much above-average. Early indications are that the current acreage in food crops may be slightly less than it was last year because of some unfavorable weather at planting time. Therefore, unless yields are again much above average, production in this area will be somewhat below that of the last season. Favorable weather for the production of dairy products in Australia and New Zealand is resulting in some increase in exportable supplies from this area, but only a very moderate increase is expected in the prospective supplies of meat from the Southern Hemisphere countries.

The changes in crop conditions in different regions point to an overall world output of bread grains in 1948-49 about 7 percent larger than that of last year. Some expansion in consumption is already taking place and with world stocks generally low at the beginning of the season, it is unlikely that there could be any excessive accumulation of grain stocks in the surplus-producing areas during 1948-49. This presupposes, of course, that importing countries will be able to finance their import requirements during the current consumption year from their own resources or by means of loans or gifts. Supplies of sugar appear ample and there probably will be some substitution of cereals for sugar in a few countries in which supplies of cereals have been unusually short this last year.

A larger world cottonseed crop this year, some resumption in production of palm oils, and a possible increase in production of peanuts points to a continuation of the upward trend in supplies of fats and oils that are available for world trade. Supplies, however, will continue below prewar and demand will be strong. The larger supply of feed grains this year will be only slightly reflected in increased supplies of meat and dairy products. These increased feed supplies might even hasten the building up of the herds and thus temporarily decrease the available supplies of meat. Thus, while world supplies of food are gradually improving, an unusually large demand for cereal grains to meet the shortages of other foods will continue in many parts of the world. In addition there will be substantial demand for oilseeds and livestock products.

## DISTRIBUTION OF UNITED STATES FOOD SUPPLIES, 1947-48 1/

Near record production of food crops in the United States in 1947-48 made possible:

1. Civilian per capita food consumption in the fiscal year 1947-48 14 percent above the prewar 1935-39 average.
2. Record exports of more than 43.3 billion pounds -- slightly more than the previous record of approximately 42.9 billion pounds established the year before.

U. S. civilian per capita food consumption high in 1947-48:

Despite a slight increase in food exports from the 1946-47 total, civilian per capita consumption of food remained well above the prewar level, even though less than in either 1945-46 and 1946-47. Most of the reduction in food consumption in 1947-48 was due to the decline in available supplies of some livestock products. Except for meat, the decreases in consumption were apparently due much more to consumer choices in use of purchasing power than to short supplies.

Foods consumed in greater quantity in 1947-48 than in the preceding fiscal year were evaporated milk, dried milk, sugar, eggs, lard, margarine, shortening and other edible fats and oils. Decreases in consumption compared with 1946-47 were indicated for wheat and corn products, rice, butter, cheese, fluid milk and cream, meat, potatoes and sweetpotatoes, dry edible beans and peas, fresh and processed fruits and vegetables, peanuts, and miscellaneous other foods. (Table 6)

Comparisons with 1945-46 indicate increases in average United States civilian consumption of rice, most fats and oils, some manufactured dairy products, sugar, dry beans and peas, eggs, and fresh and processed fruits. On the other hand, less cereal products, butter, meats, fluid milk and cream, potatoes and sweetpotatoes, fresh and processed vegetables, peanuts, and miscellaneous other foods were consumed.

In contrast with average prewar consumption (1935-39), civilians consumed in 1947-48 more of each type of food except wheat products, rice, butter, shortening and other edible fats and oils, potatoes and sweetpotatoes, sugar, and dry edible beans and peas.

On a physical quantity basis, United States civilians took 84.7 percent of the total amount of United States food distributed during the fiscal year 1947-48. (Table 7) Exports (including military shipments of food for relief feeding programs in occupied areas) accounted for 13.8 percent, United States military services took 1.1 percent for troops stationed at home and abroad, and the non-contiguous territories of the United States received 0.4 percent.

1/ Prepared by the Bureau of Agricultural Economics, the Production and Marketing Administration and the Office of Foreign Agricultural Relations.

Table 6.- Civilian per capita consumption of food, United States, fiscal years 1947-48, 1946-47, and 1945-46, and average 1935-39

| Commodity | Consumption per capita | | | |
|---|---|---|---|---|
| | Fiscal year 1947-48 | Fiscal year 1946-47 Rev. | Fiscal year 1945-46 Rev. | Prewar average 1935-39 |
| | Index 1935-39 = 100 | | | |
| Index of per capita food consumption of all foods 1/ | 114 | 117 | 118 | 100 |
| | Pounds | Pounds | Pounds | Pounds |
| Wheat flour and other wheat cereal products (grain equivalent) | 201 | 206 | 207 | 220 |
| Other grains and grain products -- total | 50.9 | 52.6 | 54.5 | 47.1 |
| Corn and corn products (grain equivalent) 2/ | 35.2 | 36.9 | 37.7 | 35.2 |
| Oats, rye, barley and grain sorghums (grain equivalent) 3/ | 15.7 | 15.7 | 16.8 | 11.9 |
| Rice (milled basis) | 4.8 | 4.9 | 4.1 | 5.6 |
| Fats and oils, edible -- total (product weight) | 45.6 | 43.6 | 41.9 | 48.6 |
| Butter (product weight) | 10.2 | 11.4 | 10.8 | 16.7 |
| Lard | 12.7 | 11.8 | 12.1 | 11.0 |
| Margarine (product weight) | 5.9 | 4.2 | 3.6 | 2.9 |
| Shortening and other edible fats and oils | 16.8 | 16.2 | 15.4 | 18.0 |
| Meat (dressed weight equivalent) 4/ | 150.6 | 154.5 | 155.5 | 126.2 |
| Dairy products: | | | | |
| Fluid milk and cream 5/ | 390 | 398 | 435 | 340 |
| Cheese | 6.9 | 7.3 | 6.2 | 5.5 |
| Condensed and evaporated milk | 20.2 | 18.5 | 17.9 | 16.7 |
| Dried milk | 4.1 | 2.9 | 3.7 | 2.0 |
| Other foods: | | | | |
| Potatoes and sweetpotatoes | 133.6 | 140.6 | 146.6 | 152.4 |
| Dry beans and peas | 8.6 | 8.9 | 7.5 | 9.3 |
| Sugar, beet and cane (refined) | 93.3 | 79.5 | 67.8 | 96.5 |
| Eggs (shell equivalent) | 47.6 | 47.3 | 47.3 | 37.3 |
| Fruits -- total | 182.5 | 192.5 | 173.0 | 163.5 |
| Fresh (farm weight) | 141 | 148 | 132 | 138 |
| Processed (product weight) | 41.5 | 44.5 | 41.0 | 25.5 |
| Vegetables -- total (excl. potatoes and sweetpotatoes) | 288.9 | 311.0 | 309.4 | 266.5 |
| Fresh (farm weight) | 248 | 265 | 262 | 235 |
| Processed (product weight) 6/ | 40.9 | 46.0 | 47.4 | 31.5 |
| Peanuts (farmers stock equiv., excl. oil) | 6.9 | 8.3 | 10.1 | 6.7 |
| Miscellaneous 7/ | 203 | 208 | 230 | 163 |

1/ Weighted by average retail prices for 1935-39. 2/ Excludes quantities consumed as corn sugar, corn sirups and alcoholic beverages. 3/ Includes grain equivalent of oatmeal and rye flour; excludes grains used for alcoholic beverages. 4/ Excludes meat offals and horsemeat. 5/ In other tables of this report, fluid milk and cream are included with "other foods -- miscellaneous". 6/ Excludes canned baby foods and soups. 7/ Includes meat offals, poultry, fish, corn and maple sugars, sirups, honey, dairy products (not elsewhere specified), coffee, tea, cocoa, tree nuts, canned baby foods and soups, and soybeans (excluding oil), etc.

Table 7.- Distribution of United States food supplies: U. S. civilians, U. S. military, U. S. territories, and exports, fiscal year 1947-48

| Commodity | Total food distribution 1/ | Percentage of total food distribution: U.S. civilians | U.S. military | U.S. territories | Exports 2/ |
|---|---|---|---|---|---|
| | Mil. lb. | Percent | Percent | Percent | Percent |
| Total food | 314,350 | 84.7 | 1.1 | .4 | 13.8 |
| Wheat and wheat products (grain equiv.) | 58,878 | 49.4 | .7 | .4 | 49.5 |
| Other grains--total (grain equiv.) | 12,553 | 58.7 | .8 | .7 | 39.8 |
| Corn and corn products | 7,408 | 68.9 | .4 | .5 | 30.2 |
| Barley, oats, rye and grain sorghums | 5,145 | 44.1 | 1.3 | .9 | 53.7 |
| Rice (milled basis) | 2,031 | 34.3 | 4.3 | 16.5 | 44.9 |
| Fats and oils, edible (incl. butter) | 7,325 | 90.2 | 1.2 | .9 | 7.7 |
| Meat (carcass weight equiv.) | 22,508 | 96.9 | 2.0 | .4 | .7 |
| Dairy products (product weight): | | | | | |
| Cheese | 1,125 | 89.1 | 1.2 | .5 | 9.2 |
| Condensed and evaporated milk | 3,637 | 80.6 | 2.7 | 1.2 | 15.5 |
| Dried milk | 989 | 60.2 | .9 | 2.2 | 36.7 |
| Other foods: | | | | | |
| Potatoes and sweetpotatoes (farm weight equiv.) | 20,911 | 92.7 | 2.0 | .5 | 4.8 |
| Dry beans and peas (incl. indirect uses) | 1,879 | 66.3 | 2.3 | 2.8 | 28.6 |
| Sugar (refined) | 13,903 | 97.3 | .9 | .1 | 1.7 |
| Eggs (shell equiv.) | 7,340 | 94.0 | 1.4 | .2 | 4.4 |
| Fruits - total | 28,822 | 91.8 | 1.2 | .3 | 6.7 |
| Fresh (farm weight) | 21,696 | 94.3 | .6 | .2 | 4.9 |
| Processed (product weight) | 7,126 | 84.2 | 3.2 | .4 | 12 2 |
| Vegetables - total (excl. potatoes and sweetpotatoes) | 42,770 | 97.8 | 1.0 | 1.0 | .2 |
| Fresh (farm weight) | 36,401 | 98.6 | .6 | .1 | .7 |
| Processed (product weight) | 6,369 | 93.1 | 3.5 | .7 | 2.7 |
| Peanuts (farmers stock equiv., excl. oil) | 1,536 | 65.1 | .2 | .1 | 34.6 |
| Miscellaneous 3/ | 88,143 | 97.6 | .7 | - | 1.7 |

1/ Includes U.S. military stocks accumulated prior to July 1947 and used for civilian relief feeding programs in occupied areas during fiscal year 1947-48.

2/ Includes exports of food by U.S. military for civilian relief feeding programs in occupied areas.

3/ Includes meat offals, horsemeat, poultry, fish, corn and maple sugars, sirups, honey, tree nuts, coffee, tea, cocoa, soybeans (excluding oil), fluid milk and cream, and other dairy products (not elsewhere specified).

When quantities of the great variety of foods are combined in value terms using prewar farm prices throughout, it is found that civilians received practically the same proportion of all food moving into distribution in 1947-48 as in 1946-47. Other comparisons are indicated in table 8.

Table 8.- Distribution of United States food supplies, 1935-39 average and fiscal years 1945-46, 1946-47 and 1947-48

| Distribution | (Percent of total distribution in each period) | | | |
|---|---|---|---|---|
| | 1947-48 | 1946-47 | 1945-46 | 1935-39 average |
| | Percent | Percent | Percent | Percent |
| U. S. civilians | 91.0 | 90.2 | 85.6 | 97.4 |
| U. S. armed forces | 1.5 | 1.9 | 5.2 | - |
| Withdrawals for export 1/ | 7.2 | 7.5 | 8.8 | 2.1 |
| U. S. territories | 0.3 | 0.4 | 0.4 | 0.5 |

1/ Including civilian feeding programs in occupied areas abroad.

For some specific commodities, U. S. civilians consumed practically all of the supplies. Meat is outstanding in this respect. U. S. civilians received 96.9 percent of all meat in 1947-48; U. S. military agencies, 2.0 percent; U. S. territories, 0.4 percent; and exports, 0.7 percent. The distribution of eggs closely parallels that of meat, with U. S. civilians getting 94 percent of the total; U. S. military agencies, 1.4 percent; U. S. territories, 0.2 percent; and exports, 4.4 percent. For some other important commodities, U. S. civilians received nearly 90 percent of the cheese distributed, 80 percent of condensed and evaporated milk (combined), 98 percent of the vegetables, and over 90 percent of the fruits.

Record exports of food from the United States in 1947-48

Total food exports of 43,337 million pounds in 1947-48 were only slightly larger on a poundage basis than during the preceding fiscal year, but about 11 percent above the exports in the first postwar year, 1945-46. (Tables 9 and 10)

Exports of cereal products including rice totaled 35,071 million pounds, 1,051 million above 1946-47. This increase a little more than offset the small reductions in the exports of livestock products and other foods from the 1946-47 rates.

Table 9.- Summary of food exports from the United States by major groups, average 1935-39 and fiscal years 1945-46, 1946-47 and 1947-48.

| Period | Wheat and wheat products (grain equiv.) | Other grains (grain equiv.) | Rice (milled) | Fats and oils 1/ | Meat (carcass equiv.) | Dairy products (product weight) 2/ | Other foods | Total food exports |
|---|---|---|---|---|---|---|---|---|
| | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. | Mil. lb. |
| 1935-39 | 3,060 | 2,991 | 186 | 195 | 123 | 38 | 2,866 | 9,459 |
| 1945-46 | 23,529 | 2,926 | 789 | 694 | 1,376 | 1,828 | 8,054 | 39,196 |
| 1946-47 | 23,808 | 9,332 | 880 | 493 | 405 | 1,153 | 6,847 | 42,918 |
| 1947-48 | 29,160 | 5,000 | 911 | 562 | 153 | 1,030 | 6,521 | 43,337 |

1/ Incl. butter.
2/ Excl. butter.

Grains including rice accounted for about 81 percent of the total export tonnage of which wheat and wheat products represented 67 percent; the other grains, 12 percent; and rice 2 percent. These products were a larger proportion of total exports in 1947-48 than they were in the preceding two fiscal years, partly because of plentiful supplies and partly due to the necessity for the European countries to conserve their limited resources of dollars by purchasing the low cost but high calorie grains. In both 1946-47 and 1947-48 grain shipments abroad were restricted to food and seed uses.

Wheat and wheat products (grain equivalent) exports of 29,160 million pounds (486 million bushels) in 1947-48 are the largest on record. They were almost 10 times the average annual exports for 1935-39. Exports accounted for almost half of the total U. S. distribution of wheat for food in 1947-48. The relatively larger wheat supply in the United States in 1947-48 permitted the shift from coarse grains back to wheat and wheat products.

Exports of corn and corn products amounted to 2,235 million pounds (grain equivalent), only a third of the 1946-47 rate. In 1947-48 they represented about 30 percent of the total distribution of corn for food. The outmovement of barley, malt, grain sorghums, oats, oatmeal, rye and rye flour in 1947-48 totaled 2,765 million pounds (grain equivalent) -- slightly above the level of the previous fiscal year, but 2/3 greater than in 1945-46 and about 4 times the a verage annual exports in 1935-39. Exports in 1947-48 accounted for 54 percent of the total distribution of these grains for food. India and Pakistan received most of the grain sorghums. Rice exports of 911 million pounds (milled basis) exceeded slightly the previous record of 880 million pounds established in 1946-47. Exports, amounting to about 45 percent of the total U. S. rice distribution in 1947-48, were made principally to those areas where rice is an important food in the local diet -- Cuba and the Far Eastern countries.

The milling by-products of the flour and other products remained in this country for feed use. A summary of grain exports follows:

Fiscal Year 1947-48

| Exported as grain: | Million pounds | Million bushels |
|---|---|---|
| Wheat | 18,281 | 304.7 |
| Rice, rough | 20 | 1.8 |
| Corn | 1,632 | 29.1 |
| Rye | 126 | 2.2 |
| Oats | 361 | 11.3 |
| Barley | 803 | 16.7 |
| Grain sorghums | 797 | 14.2 |
| Total | | 380.0 |
| Total excl. rice | | 378.2 |

| Exported as grain products: | Mil. lb. product wt. | Mil. bu. grain equiv. |
|---|---|---|
| Wheat flour | 6,683 | 174.9 |
| Semolina | 25 | .6 |
| Macaroni | 240 | 5.3 |
| Rice milled | 859 | 29.6 (rough equiv.) |
| Rye flour | 154 | .4 |
| Corn meal | 100 | 3.2 |
| Corn grits | 49 | 1.7 |
| Corn starch | 204 | 5.9 |
| Oatmeal | 124 | 9.4 |
| Malt | 252 | 7.4 |
| Total | 8,695 | 238.9 |
| Total excl. rice | 7,836 | 209.3 |

Total, grain and grain products exports, excluding rice-- 587.5 million bushels, grain equivalent.

Fats and oils exports of 562 million pounds were about 14 percent above those of the preceding fiscal year and almost 3 times the prewar (1935-39) average annual rate, but 19 percent below the 1945-46 level. An improvement in the domestic supply of vegetable oils made possible the increase in the fats and oils exports over the 1946-47 total.

The reduction in the marketings of livestock from the levels of the 2 preceding fiscal years, and the heavy United States civilian demand for meat and meat products, account for the relatively small quantity of meat exported in 1947-48. Meat exports of 153 million pounds (carcass equivalent) were only a third of the quantity shipped out of the United States in 1946-47 and a tenth of the 1945-46 exports.

Exports of cheese, canned milk and dried milk in 1947-48 totaled 1,030 million pounds. This was more than 10 percent below the total of the previous fiscal year and 44 percent under the 1945-46 rate, but much more than prewar exports. The bulk of the 1947-48 exports of dairy products were canned milk and non fat dry milk solids. Of the total U. S. distribution in 1947-48, exports accounted for 37 percent of the dried milk and 16 percent of the canned milk. Non fat dry milk solids (dry skim milk) are provided to school children in Germany and Japan under a school lunch feeding program.

Aggregate exports of other foods -- principally fruits, vegetables, potatoes, eggs, dry beans and peas, soybeans, and peanuts -- amounted to 6,521 million pounds, and was less than in either of the two preceding fiscal years. Peanuts exported to Europe were crushed there for peanut oil. Exports represented almost 30 percent of the total U. S. distribution of dry beans and peas in 1947-48.

E.R.P. countries received most U. S. food exports:

Most of the exports of food from the U. S. in 1947-48 went to countries cooperating in the European Recovery Program, to aid in their rehabilitation. These European countries received a total of 28,126 million pounds, 65 percent of the total food exports from the United States (tables 9, 11-14). European countries not cooperating under this plan received 1.4 percent; Far Eastern countries, 16.4 percent; Latin American Republics, 9.5 percent, Canada 4.1 percent; and other areas, 3.6 percent.

The bizone or U.S.-U.K. areas of Germany received more of the foods exported from the United States than any other country. Germany obtained the largest quantity of wheat (8,336 million pounds), other grains and grain products (1,149 million pounds), and "other foods" (1,483 million pounds). For fats and oils and also dairy products, this area ranked third highest with 78 and 99 million pounds, respectively. The dairy products were mainly non fat dry milk solids (dry skim milk). Relatively little meat and only a very minor quantity of rice were sent there.

The Far East area under U. S. military control (i.e., Japan, Korea and the Ryukyu Islands) was the second largest recipient of our food exports. The bulk of the receipts were wheat and wheat flour (2,719 million pounds), other grains and grain products (857 million pounds), and "other foods", most of which were soybeans, (812 million pounds).

France and French North Africa received the third largest quantity of food exported by the United States in 1947-48 -- 4,157 million pounds. This total consisted principally of wheat and wheat flour (3,595 million pounds) and other grains and grain products (315 million pounds). This area, with 82 million pounds, ranked second among the countries receiving fats and oils from the United States.

About 4,110 million pounds of food were shipped to the Latin American Republics. Exports of wheat and wheat products totaled 2,024 million pounds; other grains and grain products, 400 million pounds; rice, 552 million pounds; fats and oils, 147 million pounds; meat, 23 million pounds; dairy products, 125 million pounds; and other foods, 839 million pounds. Most of the rice went to Cuba, a country which has always been a large market for rice produced in the United States.

Other areas which received large quantities of food from this country in 1947-48 were Italy (3,628 million pounds), Greece (1,733 million pounds), Austria (1,715 million pounds), and Netherlands (1,713 million pounds). All of these countries are participating in the European Recovery Program.

Belgium and Luxembourg, which also ranked high among the recipients of U. S. foods, obtained the largest quantity of dairy products -- 197 million pounds. The United Kingdom received only 814 million pounds of food, the smallest quantity since before World War II. In 1947-48 meat exports of 52 million pounds, approximately a third of the total exported, went to the United Kingdom.

The large volume of exports to Germany and the occupied area in the Far East was principally under the direction of U. S. military agencies.

U. S. military exports for civilian relief abroad still significant:

Since 1945-46 exports of food for civilian feeding in occupied areas abroad financed by U. S. military funds have been increasing. Measured on a physical quantity basis, in 1947-48 these shipments represented almost 29 percent of the total food exports from the United States. For 1946-47, exports under this program accounted for more than 21 percent, and in the preceding fiscal year, about 18.5 percent.

On a commodity basis the U. S. military exports to occupied areas were also significant in 1947-48. Wheat and wheat products exports were 28 percent of the corresponding total; corn and corn products, 24 percent; other grains and products, 43 percent; dried milk (principally non fat dry milk solids), 32 percent; potatoes, almost 41 percent; dry beans and peas, 45 percent; processed fruits (mainly dried fruit), 41 percent; soybeans and soybean products (excluding oil), 74 percent; peanuts, 40 percent.

U. S. military agencies depended heavily upon the Department of Agriculture for procurement of many foods to be exported to areas under military control.

U. S. Department of Agriculture procured major part of foods exported in 1947-48.

More than 60 percent of the total food exports were procured by the Department of Agriculture. The commodities were obtained specifically for export programs or under price support operations.

Among the major commodities, the Department of Agriculture purchased about 78 percent of the total wheat and wheat flour exported in 1947-48, about 28 percent of the rice, 40 percent of the other grains and grain products, 70 percent of the potatoes, over 80 percent of the non fat dry milk solids, about 70 percent of the dried fruit, more than 75 percent of the eggs, over 50 percent of the peanuts and 35 percent of the dry beans and peas.

The balance of the exports was procured by U. S. military agencies or through commercial channels.

Table 10.- Food exports from the United States, by major food groups, fiscal years 1947-48, 1946-47 and 1945-46, average 1935-39 1/

| Commodity | Fiscal year 1947-48 | Fiscal year 1946-47 Revised | Fiscal year 1945-46 Revised | Average 1935-39 Revised |
|---|---|---|---|---|
| | Million pounds | Million pounds | Million pounds | Million pounds |
| Total food exports | 43,337 | 42,918 | 39,196 | 9,459 |
| Wheat and wheat products (grain equiv.) 2/ | 29,160 | 23,808 | 23,529 | 3,060 |
| Other grains--total (grain equiv.) | 5,000 | 9,332 | 2,926 | 2,991 |
| Corn and corn products | 2,235 | 6,704 | 1,268 | 2,296 |
| Barley, oats, rye and grain sorghums 3/ | 2,765 | 2,628 | 1,658 | 695 |
| Rice (milled basis) | 911 | 880 | 789 | 186 |
| Fats and oils, edible (including butter) | 562 | 493 | 694 | 195 |
| Meat (carcass weight equivalent) | 153 | 405 | 1,376 | 123 |
| Dairy products (product weight) | | | | |
| Cheese | 104 | 162 | 300 | 1 |
| Condensed and evaporated milk | 563 | 670 | 1,132 | 31 |
| Dried milk | 363 | 321 | 396 | 6 |
| Other foods: | | | | |
| Potatoes and sweetpotatoes (farm weight equivalent) | 1,008 | 901 | 1,789 | 116 |
| Dry beans and peas (including indirect uses) | 538 | 500 | 862 | 54 |
| Sugar (refined) | 243 | 557 | 792 | 196 |
| Eggs (shell equivalent) | 726 | 536 | 603 | 3 |
| Fruits -- total | 1,940 | 2,228 | 1,654 | 1,922 |
| Fresh (farm weight) | 1,068 | 1,395 | 1,026 | 1,197 |
| Processed (product weight) | 872 | 833 | 628 | 725 |
| Vegetables -- total (excluding potatoes and sweetpotatoes) | 433 | 688 | 1,297 | 132 |
| Fresh (farm weight) | 262 | 473 | 937 | 92 |
| Processed (product weight) | 171 | 215 | 360 | 40 |
| Peanuts (farmers stock equivalent, excluding oil) | 532 | 279 | 99 | 1 |
| Miscellaneous 4/ | 1,501 | 1,158 | 953 | 442 |

1/ Excludes shipments to the non-contiguous territories of the United States.
2/ Excludes exports of flour milled in bond.
3/ Including malt, oatmeal and rye flour.
4/ Includes meat offals, horsemeat, poultry, fish, corn and maple sugars, sirups, honey, tree nuts, coffee, tea, cocoa, soybeans (excluding oil), and fluid milk and cream.

Table 11.- Food exports from the United States, by destination, fiscal year 1947-48 1/

| Destination | Total | Wheat and wheat products (grain equivalent) | Other grains and products 2/ (grain equivalent) | Rice (milled basis) | Fats and oils 3/ | Meats 4/ (carcass weight) | Dairy products 5/ (product weight) | Other foods 6/ |
|---|---|---|---|---|---|---|---|---|
| | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. |
| Total exports | 43,337 | 29,160 | 5,000 | 911 | 562 | 153 | 1,030 | 6,521 |
| Europe - total 7/ | 28,734 | 21,980 | 2,447 | 22 | 380 | 102 | 676 | 3,127 |
| ERP participating countries: total 7/ | 28,126 | 21,609 | 2,326 | 22 | 346 | 102 | 637 | 3,084 |
| Austria | 1,715 | 1,248 | 144 | 9 | 42 | 8/ | 20 | 252 |
| Belgium and Luxembourg | 1,523 | 721 | 241 | 8/ | 43 | 10 | 197 | 311 |
| Denmark | 78 | 55 | 7 | 8/ | 15 | 8/ | 1 | 8/ |
| France and French North Africa | 4,157 | 3,595 | 315 | 2 | 82 | 8/ | 50 | 113 |
| Germany | 11,157 | 8,336 | 1,149 | 8/ | 78 | 12 | 99 | 1,483 |
| Greece | 1,733 | 1,390 | 40 | 10 | 8 | 24 | 85 | 176 |
| Iceland | 22 | 3 | 12 | 1 | 1 | 8/ | 8/ | 5 |
| Ireland | 252 | 248 | 3 | 0 | 8/ | 8/ | 8/ | 1 |
| Italy | 3,628 | 3,269 | 86 | 8/ | 30 | 3 | 47 | 193 |
| Netherlands | 1,713 | 1,452 | 81 | 8/ | 14 | 8/ | 15 | 151 |
| Norway | 241 | 235 | 1 | 8/ | 8/ | 8/ | 1 | 4 |
| Portugal | 399 | 398 | 8/ | 0 | 0 | 8/ | 8/ | 1 |
| Sweden | 179 | 129 | 18 | 8/ | 8/ | 1 | 8/ | 31 |
| Switzerland | 494 | 306 | 74 | 8/ | 20 | 8/ | 23 | 71 |
| Turkey | 21 | 21 | 0 | 0 | 0 | 8/ | 0 | 8/ |
| United Kingdom | 814 | 203 | 155 | 8/ | 13 | 52 | 99 | 292 |
| Other European countries -- total | 608 | 371 | 121 | 8/ | 34 | 8/ | 39 | 43 |
| Spain | 2 | 8/ | 2 | 0 | 0 | 8/ | 8/ | 8/ |
| U.S.S.R. | 8/ | 0 | 0 | 0 | 8/ | 8/ | 8/ | 8/ |
| Other 9/ | 606 | 371 | 119 | 8/ | 34 | 8/ | 39 | 43 |
| Far East - total | 7,123 | 4,144 | 1,477 | 252 | 8 | 8 | 140 | 1,094 |
| Philippines | 699 | 282 | 51 | 8/ | 7 | 6 | 82 | 271 |
| China | 444 | 238 | 1 | 203 | 8/ | 8/ | 2 | 8/ |
| India and Pakistan | 1,489 | 905 | 568 | 0 | 8/ | 8/ | 7 | 9 |
| Japan, Korea and Ryukyu | 4,487 | 2,719 | 857 | 49 | 1 | 2 | 47 | 812 |
| Thailand and Burma | 4 | 0 | 8/ | 0 | 8/ | 0 | 2 | 2 |
| Canada | 1,788 | 51 | 453 | 54 | 14 | 2 | 1 | 1,213 |
| Latin American Republics | 4,110 | 2,024 | 400 | 552 | 147 | 23 | 125 | 839 |
| Other areas | 1,582 | 961 | 223 | 31 | 13 | 18 | 88 | 248 |

1/ Excludes shipments to the non-contiguous territories of the United States.
2/ Includes corn and corn products other than corn sugar and sirup, barley and malt, oats, oatmeal, rye, rye flour and grain sorghums. See table 12 for commodity details.
3/ Includes butter, lard, margarine, shortening and other edible fats and oils.
4/ Meat offals and horsemeat are included with "other foods".
5/ Includes cheese, condensed and evaporated milk, dried whole milk and dry skim milk. See table 13 for commodity details.
6/ Includes potatoes and sweetpotatoes, dry beans and peas, sugar, eggs, fresh and processed fruits and vegetables, peanuts, etc See table 14 for commodity details..
7/ Includes French North Africa (i.e., Algeria, Tunisia and French Morocco) and Turkey.
8/ Less than 0.5 million pounds.
9/ Albania, Bulgaria, Czechoslovakia, Finland, Hungary, Poland, Romania and Yugoslavia.

Table 12.- Exports of grains other than wheat and rice from the United States, by destination, fiscal year 1947-48 1/

(Grain equivalent)

| Destination | Other grains--total | Corn and corn products | Barley and malt | Oats and oatmeal | Grain sorghums | Rye and rye flour |
|---|---|---|---|---|---|---|
| | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds |
| Total exports | 5,000 | 2,235 | 1,159 | 663 | 797 | 146 |
| Europe - Total 2/ | 2,447 | 1,284 | 456 | 512 | 127 | 68 |
| ECA participating countries-total 2/ | 2,326 | 1,164 | 455 | 512 | 127 | 68 |
| Austria | 144 | 31 | 5 | 86 | 0 | 22 |
| Belgium and Luxembourg | 241 | 195 | 30 | 16 | 0 | 0 |
| Denmark | 7 | 7 | 0 | 0 | 0 | 0 |
| France and French North Africa | 315 | 314 | 1 | 3/ | 0 | 0 |
| Germany | 1,149 | 541 | 368 | 267 | 127 | 46 |
| Greece | 40 | 1 | 1 | 38 | 0 | 0 |
| Iceland | 12 | 12 | 3/ | 3/ | 0 | 0 |
| Ireland | 3 | 1 | 2 | 3/ | 0 | 0 |
| Italy | 86 | 4 | 17 | 65 | 0 | 3/ |
| Netherlands | 81 | 76 | 0 | 5 | 0 | 0 |
| Norway | 1 | 1 | 0 | 0 | 0 | 0 |
| Portugal | 3/ | 3/ | 0 | 3/ | 0 | 0 |
| Sweden | 18 | 3/ | 0 | 18 | 0 | 0 |
| Switzerland | 74 | 26 | 31 | 17 | 0 | 0 |
| Turkey | 0 | 0 | 0 | 0 | 0 | 0 |
| United Kingdom | 155 | 155 | 3/ | 3/ | 3/ | 3/ |
| Other European countries--total | 121 | 120 | 1 | 3/ | 0 | 0 |
| Spain | 2 | 2 | 0 | 0 | 0 | 0 |
| U.S.S.R. | 0 | 0 | 0 | 0 | 0 | 0 |
| Other 4/ | 119 | 118 | 1 | 3/ | 0 | 0 |
| Far East - total | 1,477 | 372 | 430 | 4 | 670 | 1 |
| Philippines | 51 | 34 | 13 | 4 | 0 | 0 |
| China | 1 | 3/ | 1 | 3/ | 0 | 0 |
| India and Pakistan | 568 | 15 | 0 | 3/ | 553 | 0 |
| Japan, Korea and Ryukyu | 857 | 323 | 416 | 3/ | 117 | 1 |
| Thailand and Burma | 3/ | 3/ | 3/ | 3/ | 0 | 0 |
| Canada | 453 | 373 | 3 | 3/ | 3/ | 77 |
| Latin American Republics | 400 | 46 | 235 | 119 | 3/ | 3/ |
| Other areas | 223 | 160 | 35 | 28 | 0 | 0 |

1/ Excludes shipments to non-contiguous territories of the United States.
2/ Includes French North Africa (i.e., Algeria, Tunisia and French Morocco) and Turkey.
3/ Less than 0.5 million pounds.
4/ Albania, Bulgaria, Czechoslovakia, Finland, Hungary, Poland, Romania, and Yugoslavia.

Table 13.- Exports of dairy products from the United States, by destination, fiscal year 1947-48 1/

| Destination | Total | Cheese | Condensed and evaporated milk | Dried whole milk | Dry skim milk |
|---|---|---|---|---|---|
| | Million pounds | Million pounds | Million pounds | Million pounds | Million pounds |
| Total exports | 1,030 | 104 | 563 | 104 | 259 |
| Europe - total 2/ | 676 | 99 | 332 | 42 | 203 |
| ERP participating countries-total 2/ | 637 | 99 | 332 | 39 | 167 |
| Austria | 20 | 3/ | 10 | 6 | 4 |
| Belgium and Luxembourg | 197 | 37 | 154 | 1 | 5 |
| Denmark | 1 | 0 | 3/ | 3/ | 1 |
| France and French North Africa | 50 | 3/ | 26 | 18 | 6 |
| Germany | 99 | 1 | 3/ | 7 | 91 |
| Greece | 85 | 6 | 63 | 2 | 14 |
| Iceland | 3/ | 0 | 3/ | 0 | 0 |
| Ireland | 3/ | 0 | 3/ | 0 | 0 |
| Italy | 47 | 3/ | 29 | 1 | 17 |
| Netherlands | 15 | 3/ | 2 | 1 | 12 |
| Norway | 1 | 3/ | 0 | 1 | 3/ |
| Portugal | 3/ | 0 | 3/ | 3/ | 3/ |
| Sweden | 3/ | 0 | 3/ | 3/ | 0 |
| Switzerland | 23 | 1 | 18 | 2 | 2 |
| Turkey | 0 | 0 | 0 | 0 | 0 |
| United Kingdom | 99 | 54 | 30 | 3/ | 15 |
| Other European countries - total | 39 | 0 | 3/ | 3 | 36 |
| Spain | 3/ | 0 | 0 | 3/ | 0 |
| USSR | 3/ | 0 | 3/ | 3/ | 0 |
| Other 4/ | 39 | 0 | 3/ | 3 | 36 |
| Far East - total | 140 | 3/ | 84 | 9 | 47 |
| Philippines | 82 | 3/ | 80 | 2 | 3/ |
| China | 2 | 0 | 3/ | 1 | 1 |
| India and Pakistan | 7 | 3/ | 2 | 2 | 3 |
| Japan, Korea and Ryukyu | 47 | 3/ | 3/ | 4 | 43 |
| Thailand and Burma | 2 | 3/ | 2 | 3/ | 0 |
| Canada | 1 | 3/ | 1 | 3/ | 3/ |
| Latin America Republics | 125 | 3 | 69 | 48 | 5 |
| Other areas | 88 | 2 | 77 | 5 | 4 |

1/ Excludes shipments to the non-contiguous territories of the United States.
2/ Includes French North Africa (i.e., Algeria, Tunisia and French Morocco) and Turkey.
3/ Less than 0.5 million pounds.
4/ Albania, Czechoslovakia, Finland, Hungary, Poland, Romania, Yugoslavia, and Bulgaria.

Table 14.- Exports of other foods from the United States, by destination, fiscal year 1947-48 1/

| Destination | Total other foods | Potatoes and sweet-potatoes | Dry beans and peas | Beet and cane sugar (refined) | Eggs | Fruits, total | Vege-tables, total | Peanuts | Miscel-laneous 2/ |
|---|---|---|---|---|---|---|---|---|---|
| | Mil.lb. | Mil.lb. | Mil.lb. | Mil. lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. | Mil.lb. |
| Total exports | 6,521 | 1,008 | 538 | 243 | 326 | 1,940 | 433 | 532 | 1,501 |
| Europe - total 3/ | 3,127 | 502 | 334 | 98 | 288 | 730 | 76 | 442 | 657 |
| ERP participating countries -- total 3/ | 3,084 | 502 | 334 | 92 | 288 | 730 | 76 | 406 | 656 |
| Austria | 252 | 30 | 80 | 1 | 11 | 15 | 1 | 46 | 68 |
| Belgium and Luxembourg | 311 | 0 | 3 | 3 | 12 | 145 | 62 | 4/ | 86 |
| Denmark | 4/ | 0 | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ | 4/ |
| France and French North Africa | 113 | 17 | 1 | 6 | 2 | 5 | 4/ | 82 | 4/ |
| Germany | 1,483 | 404 | 112 | 2 | 88 | 373 | 1 | 210 | 293 |
| Greece | 176 | 51 | 47 | 35 | 4/ | 4/ | 2 | 0 | 41 |
| Iceland | 5 | 0 | 4/ | 5 | 0 | 4/ | 4/ | 0 | 4/ |
| Ireland | 1 | 0 | 4/ | 4/ | 0 | 4/ | 4/ | 0 | 1 |
| Italy | 193 | 4/ | 77 | 29 | 20 | 4 | 3 | 0 | 60 |
| Netherlands | 151 | 0 | 6 | 4/ | 1 | 14 | 1 | 61 | 68 |
| Norway | 4 | 0 | 4/ | 4/ | 0 | 4/ | 4/ | 0 | 4 |
| Portugal | 1 | 0 | 0 | 4/ | 0 | 4/ | 4/ | 1 | 4/ |
| Sweden | 31 | 0 | 1 | 4/ | 0 | 20 | 1 | 4/ | 9 |
| Switzerland | 71 | 4/ | 2 | 11 | 18 | 15 | 5 | 6 | 14 |
| Turkey | 4/ | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 4/ |
| United Kingdom | 292 | 4/ | 5 | 4/ | 136 | 139 | 4/ | 0 | 12 |
| Other European countries -- total | 43 | 0 | 4/ | 6 | 4/ | 4/ | 0 | 36 | 1 |
| Spain | 4/ | 0 | 0 | 4/ | 0 | 0 | 0 | 0 | 4/ |
| U.S.S.R. | 4/ | 0 | 0 | 4/ | 0 | 0 | 0 | 0 | 4/ |
| Other 5/ | 43 | 0 | 4/ | 6 | 4/ | 4/ | 0 | 36 | 1 |
| Far East - Total | 1,094 | 26 | 121 | 70 | 1 | 156 | 42 | 2 | 676 |
| Philippines | 271 | 25 | 1 | 2 | 1 | 111 | 36 | 4/ | 95 |
| China | 4/ | 0 | 4/ | 4/ | 0 | 4/ | 4/ | 0 | 4/ |
| India and Pakistan | 9 | 0 | 4/ | 1 | 0 | 4/ | 4/ | 0 | 8 |
| Japan, Korea and Ryukyu | 812 | 1 | 120 | 65 | 4/ | 45 | 6 | 2 | 573 |
| Thailand and Burma | 2 | 0 | 0 | 2 | 4/ | 4/ | 4/ | 0 | 4/ |
| Canada | 1,213 | 41 | 6 | 4/ | 4/ | 791 | 199 | 85 | 91 |
| Latin American Republics | 839 | 426 | 72 | 9 | 31 | 162 | 95 | 2 | 42 |
| Other areas | 248 | 13 | 5 | 66 | 6 | 101 | 21 | 1 | 35 |

1/ Excludes shipments to the non-contiguous territories of the United States.
2/ Includes meat offals, horsemeat, poultry, fish, corn and maple sugars, sirups, honey, tree nuts, coffee, tea, cocoa, soybeans (excluding oil), and fluid milk and cream.
3/ Includes French North Africa (i.e., Algeria, Tunisia and French Morocco) and Turkey.
4/ Less than 0.5 million pounds.
5/ Albania, Bulgaria, Czechoslovakia, Finland, Hungary, Poland, Romania and Yugoslavia.

Table 15.-Production of major food commodities, calendar years, 1935-39 average, 1945, 1946, 1947 and estimates for 1948 with percentage comparisons 1/

| Commodity | Unit | Average 1935-39 | 1945 | 1946 | 1947 | Preliminary estimate for 1948 | 1948 as a percentage of 1935-39 | 1948 as a percentage of 1947 |
|---|---|---|---|---|---|---|---|---|
| Meats (dr. wt.) | | | | | | | | |
| Beef | Mil.lb | 6,937 | 10,275 | 9,373 | 10,429 | 9,263 | 134 | 89 |
| Veal | " " | 1,038 | 1,661 | 1,440 | 1,599 | 1,488 | 143 | 93 |
| Lamb and mutton | " " | 870 | 1,054 | 970 | 802 | 738 | 85 | 92 |
| Pork (excluding lard) | " " | 7,337 | 10,697 | 11,173 | 10,605 | 9,827 | 134 | 93 |
| Total meats | " " | 16,182 | 23,687 | 22,956 | 23,435 | 21,316 | 132 | 91 |
| Fish (edible weight) | | | | | | | | |
| Fresh and frozen | " " | 615 | 847 | 759 | 754 | 2/ | - | - |
| Canned 3/ | " " | 337 | 418 | 464 | 483 | 2/ | - | - |
| Cured | " " | 74 | 61 | 63 | 63 | 2/ | - | - |
| Total fish | " " | 1,026 | 1,326 | 1,286 | 1,300 | 2/ | - | - |
| Poultry and eggs | | | | | | | | |
| Eggs | Mil.doz | 3,335 | 5,120 | 5,098 | 5,069 | 4,950 | 148 | 98 |
| Chicken (dr. wt.) | Mil.lb | 2,327 | 4,170 | 3,597 | 3,458 | 3,250 | 140 | 94 |
| Turkey (dr. wt.) | " " | 350 | 673 | 687 | 608 | 483 | 138 | 79 |
| Dairy products | | | | | | | | |
| Total milk 4/ | " " | 103,656 | 120,995 | 119,284 | 118,964 | 116,526 | 112 | 98 |
| Cheese 5/ | " " | 669 | 1,117 | 1,101 | 1,206 | 1,100 | 164 | 91 |
| Cond. and evap. milk | " " | 2,225 | 4,124 | 3,346 | 3,517 | 3,685 | 166 | 105 |
| Fluid milk and cream 6/ | " " | 44,146 | 57,671 | 59,318 | 57,295 | 57,339 | 130 | 100 |
| Fats and oils | | | | | | | | |
| Butter, farm & factory (actual weight) | " " | 2,170 | 1,701 | 1,505 | 1,638 | 1,535 | 71 | 94 |
| Lard 7/ | " " | 1,624 | 2,010 | 2,114 | 2,316 | 2,050 | 126 | 89 |
| Margarine (fat content) | " " | 303 | 499 | 465 | 606 | 726 | 240 | 120 |
| Shortening | " " | 1,529 | 1,441 | 1,451 | 1,376 | 1,422 | 93 | 103 |
| Other edible fats and oils 8/ | " " | 575 | 966 | 683 | 1,075 | 1,166 | 203 | 108 |
| Total fats and oils 9/ | " " | 6,201 | 6,617 | 6,218 | 7,011 | 6,899 | 111 | 98 |
| Fruits | | | | | | | | |
| Fresh: | | | | | | | | |
| Citrus | " " | 6,875 | 9,931 | 9,296 | 9,991 | 8,725 | 127 | 87 |
| Apples (commercial) | " " | 4,385 | 2,415 | 3,936 | 3,937 | 3,450 | 79 | 88 |
| Other (excl. melons) | " " | 4,703 | 5,298 | 5,570 | 5,510 | 5,041 | 107 | 91 |
| Processed: | | | | | | | | |
| Canned fruit | " " | 1,705 | 1,905 | 3,083 | 2,701 | 2,487 | 146 | 92 |
| Canned fruit juices | " " | 334 | 1,883 | 2,442 | 2,205 | 2,414 | 723 | 109 |
| Frozen | " " | 106 | 447 | 523 | 352 | 375 | 354 | 107 |
| Dried | " " | 1,118 | 1,019 | 1,014 | 1,197 | 1,000 | 89 | 84 |

- Continued

Table 15.-Production of major food commodities, calendar years, 1935-39 average, 1945, 1946, 1947 and estimates for 1948 with percentage comparisons 1/ - Continued

| Commodity | Unit | Average 1935-39 | 1945 | 1946 | 1947 | Preliminary estimate for 1948 | 1948 as a percentage of 1935-39 | 1948 as a percentage of 1947 |
|---|---|---|---|---|---|---|---|---|
| Vegetables | | | | | | | | |
| Fresh 10/ | Mil.lb | 30,520 | 35,575 | 38,946 | 35,918 | 37,315 | 122 | 104 |
| Canned 11/ | " " | 4,084 | 6,551 | 7,637 | 6,025 | 5,288 | 129 | 88 |
| Frozen | " " | 12/ 78 | 308 | 450 | 345 | 368 | 472 | 107 |
| Potatoes | Mil bu | 356 | 419 | 484 | 384 | 431 | 121 | 112 |
| Sweetpotatoes | " " | 68 | 65 | 66 | 57 | 52 | 76 | 91 |
| Dry edible beans 13/ | Mil.lb | 1,360 | 1,195 | 1,474 | 1,598 | 1,852 | 136 | 116 |
| Canned baby foods | " " | 48 | 422 | 462 | 353 | 470 | 979 | 133 |
| Sugar, raw basis | 1,000 sh.tons | 1,948 | 1,667 | 1,900 | 2,158 | 2,100 | 108 | 97 |
| Grains | | | | | | | | |
| Wheat | Mil.bu | 759 | 1,108 | 1,153 | 1,365 | 1,284 | 169 | 94 |
| Rye | Mil.bu | 44.9 | 24.0 | 18.9 | 26.0 | 26.7 | 59 | 103 |
| Rice, milled | Mil.lbs | 1,340 | 2,045 | 2,044 | 2,207 | 2,380 | 178 | 108 |
| Corn, grain only | Mil.bu | 2,050 | 2,594 | 2,990 | 2,153 | 3,300 | 161 | 153 |
| Oats | " " | 1,045 | 1,536 | 1,498 | 1,216 | 1,493 | 143 | 123 |
| Barley | " " | 239 | 267 | 262 | 279 | 317 | 133 | 114 |
| Peanuts | Mil.lb | 1,229 | 2,042 | 2,038 | 2,188 | 2,302 | 187 | 105 |

1/ Calendar year basis except for fresh citrus fruit for which the season begins in the fall of the previous year; dried fruits which are on a pack-year basis; rice on a marketing year. 2/ Not available. 3/ Excludes canned food products containing small quantities of fish such as clam chowder, etc. 4/ The production of total milk for human consumption given here differs from total farm production of milk in that the former excludes milk fed to calves but includes off-farm production while the latter excludes off-farm production but includes milk fed to calves. Milk fed calves and milk produced off farms are usually of approximately equal volume. 5/ Excluding full skim, cottage, pot, and bakers' cheese. 6/ Fluid milk equivalent for fresh use. 7/ Excluding amount used in manufactured products. 8/ Represents fats used in cooking and salad oils, salad dressing mayonnaise, bakery products and other minor uses such as fish canning. 9/ Fat content basis except for butter which is on an actual weight basis. 10/ Estimates of all vegetables and melons other than potatoes and sweetpotatoes include reported commercial production for fresh market shipments plus rough estimates of quantities produced in market gardens for fresh sale and farm gardens for home use. Excludes town garden production. 11/ Includes asparagus, beans (lima), beans (snap), beets, carrots, corn, hominy, kraut (including bulk), peas, pickles (including bulk), pimientos, Irish potatoes, sweetpotatoes, pumpkin and squash, tomatoes, tomato pulp, and tomato juice, tomato sauce, paste, and catsup and chili sauce, mixed vegetables. 12/ Average 1937-39. Data prior to 1937 are not available. 13/ Cleaned basis.

Table 16. -- Retail food prices and total consumer price index, United States 1940-46 and 1947-48 by months

(Index numbers 1935-39= 100)

| Year and month | Meats 1/ | Eggs | Dairy products 2/ | Fats and oils 3/ | Cereals and bakery products | Fruit and vegetables: Fresh | Fruit and vegetables: Canned | Fruit and vegetables: Dried | Sugar and sweets | Beverages | All foods | Consumer price index |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1940 | 96 | 94 | 101 | 82 | 97 | 97 | 92 | 101 | 97 | 92 | 97 | 100 |
| 1941 | 108 | 112 | 112 | 94 | 98 | 104 | 98 | 107 | 106 | 102 | 106 | 105 |
| 1942 | 126 | 136 | 125 | 120 | 105 | 133 | 122 | 136 | 126 | 122 | 124 | 116 |
| 1943 | 134 | 162 | 135 | 126 | 108 | 178 | 131 | 159 | 127 | 125 | 138 | 124 |
| 1944 | 130 | 153 | 134 | 123 | 108 | 177 | 130 | 166 | 126 | 124 | 136 | 126 |
| 1945 | 131 | 164 | 134 | 124 | 109 | 188 | 130 | 168 | 126 | 125 | 139 | 128 |
| 1946 | 161 | 169 | 165 | 152 | 125 | 191 | 141 | 190 | 144 | 140 | 160 | 139 |
| 1947 | 217 | 201 | 186 | 198 | 155 | 201 | 166 | 263 | 180 | 187 | 194 | 159 |
| Jan. | 199 | 182 | 190 | 202 | 143 | 184 | 174 | 269 | 176 | 178 | 184 | 153 |
| Feb. | 197 | 170 | 183 | 201 | 144 | 189 | 173 | 270 | 178 | 183 | 182 | 153 |
| March | 208 | 175 | 188 | 219 | 148 | 199 | 173 | 271 | 179 | 187 | 190 | 156 |
| April | 203 | 176 | 179 | 228 | 153 | 201 | 173 | 270 | 179 | 190 | 188 | 156 |
| May | 204 | 179 | 172 | 200 | 154 | 210 | 172 | 268 | 179 | 189 | 188 | 156 |
| June | 217 | 183 | 172 | 188 | 155 | 208 | 170 | 263 | 180 | 181 | 190 | 157 |
| July | 220 | 203 | 179 | 182 | 155 | 204 | 168 | 264 | 180 | 181 | 193 | 158 |
| Aug. | 228 | 212 | 184 | 178 | 156 | 202 | 166 | 263 | 180 | 182 | 196 | 160 |
| Sept. | 241 | 236 | 195 | 177 | 158 | 202 | 157 | 261 | 181 | 187 | 204 | 164 |
| Oct. | 236 | 233 | 190 | 190 | 160 | 201 | 155 | 256 | 182 | 191 | 202 | 164 |
| Nov. | 227 | 225 | 198 | 196 | 168 | 205 | 156 | 252 | 183 | 195 | 203 | 165 |
| Dec. | 227 | 236 | 205 | 208 | 170 | 212 | 158 | 255 | 184 | 198 | 207 | 167 |
| 1948 | | | | | | | | | | | | |
| Jan. | 238 | 214 | 206 | 209 | 173 | 216 | 158 | 257 | 183 | 202 | 210 | 169 |
| Feb. | 225 | 189 | 204 | 194 | 172 | 222 | 158 | 256 | 177 | 204 | 205 | 168 |
| March | 225 | 186 | 201 | 192 | 171 | 214 | 158 | 254 | 174 | 204 | 202 | 167 |
| April | 234 | 185 | 206 | 191 | 171 | 228 | 156 | 252 | 174 | 204 | 208 | 169 |
| May | 244 | 185 | 205 | 197 | 171 | 229 | 156 | 250 | 173 | 205 | 211 | 170 |
| June | 255 | 194 | 206 | 200 | 171 | 225 | 157 | 248 | 171 | 205 | 214 | 172 |
| July | 262 | 204 | 209 | 201 | 171 | 223 | 158 | 248 | 171 | 205 | 217 | 174 |
| Aug. | 267 | 220 | 211 | 198 | 171 | 205 | 158 | 249 | 172 | 205 | 217 | 174 |
| Sept. | 265 | 227 | 209 | 197 | 171 | 200 | 159 | 249 | 173 | 206 | 215 | 174 |
| Oct. | 256 | 239 | 203 | 193 | 170 | 197 | 159 | 238 | 173 | 206 | 212 | 174 |

Index numbers from Bureau of Labor Statistics and rounded to the nearest whole number by Bureau of Agricultural Economics.

1/ Includes chicken and fish.

2/ Includes butter.

3/ Excludes butter.